



THE REGIONAL MUNICIPALITY OF NIAGARA
COUNCIL ORDER OF BUSINESS

CL 09-2019

Thursday, April 25, 2019

6:30 p.m.

Council Chamber

Niagara Region Headquarters, Campbell West

1815 Sir Isaac Brock Way, Thorold, ON

			Pages
1.	<u>CALL TO ORDER</u>		
2.	<u>LAND ACKNOWLEDGMENT STATEMENT</u>	Ugulini	
3.	<u>MOMENT OF REFLECTION</u>	Insinna	
4.	<u>SINGING OF 'O CANADA'</u>		
5.	<u>ADOPTION OF AGENDA</u>		
5.1	<u>Addition of Items</u>		
5.2	<u>Changes in Order of Items</u>		
6.	<u>DISCLOSURES OF PECUNIARY INTEREST</u>		
7.	<u>PRESENTATIONS</u>		
8.	<u>CHAIR'S REPORTS, ANNOUNCEMENTS, REMARKS</u>		
9.	<u>DELEGATIONS</u>		
9.1	<u>Transportation Infrastructure Means Protection Update (Minute Item 5.2 of PWC 4-2019 (Agenda Item 12.4))</u>		
9.1.1	Julie Taffs, Resident, City of St. Catharines The delegation request is attached to this agenda item as CL-C 29-2019.		8 - 9

9.1.2	Lacey Willmott, Resident, Town of Fort Erie The delegation request is attached to this agenda item as CL-C 30-2019. This delegation request has been withdrawn.	10 - 11
9.1.3	Derek and Heather Tuba, Residents, City of St. Catharines The delegation request is attached to this agenda item as CL-C 31-2019.	12 - 13
9.1.4	Taylor Thomas, Resident, City of St. Catharines The delegation request is attached to this agenda item as CL-C 32-2019.	14 - 15
10.	<u>ADOPTION OF MINUTES</u>	Gale
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11.1.1	CL-C 27-2019 A memorandum from A.-M. Norio, Regional Clerk, dated April 25, 2019, respecting Triple Majority Achieved for By-law No. 2019-07 being a by-law to amend By-law 112-2013 being a by-law to protect children and vulnerable persons from exposure to outdoor second-hand smoke.	37 - 72
11.1.2	CL-C 33-2019 A memorandum from A.-M. Norio, Regional Clerk, dated April 25, 2019, respecting Provincial Review of Regional Government.	73 - 118
11.1.3	CL-C 35-2019 A memorandum from R. Mostacci, Commissioner, Public Works, dated April 25, 2019, respecting Parameters of Regional Matching Funding for Smarter Niagara Incentive Program Tax Increment Grants.	119 - 241
11.2	<u>For Consideration</u>	
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Request for Appointment to the Waste Management Planning
Steering Committee

11.2.2	<u>CL-C 34-2019</u> Standing Committee Appointment	<i>Edgar</i>	243
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12. COMMITTEE REPORTS - OPEN SESSION

12.1	<u>Committee of the Whole</u> Minutes COTW 02-2019, Thursday, April 4, 2019	Heit	244 - 434
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12.7	<u>Planning and Economic Development Committee</u> Minutes PEDC 4-2019, Wednesday, April 17, 2019	Huson	1003 - 1090

13. CHIEF ADMINISTRATIVE OFFICER'S REPORT(S)

14. MOTIONS

14.1	<u>Community Improvement Plan Areas Eligible for 2019 Smarter Niagara Incentive Program Funding</u> In accordance with the notice and submission deadline requirements of Sections 18.1 (b) and 11.3, respectively, of Niagara Region's Procedural By-law, the Regional Clerk received from Councillor Redekop a motion to be brought forward for consideration at the April 25, 2019 Council meeting respecting Community Improvement Plan Areas Eligible for 2019 Smarter Niagara Incentive Program Funding.	Redekop	1091
14.2	<u>Discussion of Provincial Review of Regional Government</u> In accordance with the notice and submission deadline requirements of Sections 18.1 (b) and 11.3, respectively, of Niagara Region's Procedural By-law, the Regional Clerk received from Councillor Fertich a motion to		1092

be brought forward for consideration at the April 25, 2019 Council meeting respecting Discussion of Provincial Review of Regional Government.

15. NOTICES OF MOTION

16. OTHER BUSINESS

17. MOTION FOR CLOSED SESSION

18. CLOSED SESSION

18.1 Council Minutes - Closed Session

18.1.1 Council Minutes - Closed Session March 28, 2019 (Special Meeting)

18.1.2 Council Minutes - Closed Session March 28, 2019 (Regular Meeting)

18.2 Committee Reports - Closed Session

18.2.1 Public Works Committee (April 16, 2019)

18.2.2 Corporate Services Committee (April 17, 2019)

19. REPORT FROM CLOSED SESSION

20. BY-LAWS

Villella

20.1 Bill 2019-38

1093 -
1094

A by-law to accept, assume and dedicate part of Lot 23, Concession 3, in the City of St. Catharines as part of Regional Road No. 38 (Martindale Road).

20.2 Bill 2019-39

1095 -
1096

A by-law to accept, assume and dedicate Part of Lot 45 CP Plan 5, in the City of St. Catharines as part of Regional Road No. 48 (Niagara Street).

20.3 Bill 2019-40

1097 -
1099

A by-law to accept, assume and dedicate part of Township Lot 76, part of the road allowance between Township Lots 73 and 74, part of the road allowance between Township Lots 74 and 76, in the City of Niagara Falls as part of Regional Road No. 57 (Thorold Stone Road).

20.4	<u>Bill 2019-41</u>	1100 - 1101
	A by-law to amend By-law No. 120-2010, the Procedural By-law (Section 9).	
20.5	<u>Bill 2019-42</u>	1102 - 1103
	A by-law to set tax ratios and tax rate reductions for prescribed property subclasses for Regional purposes and area municipal purposes for the year 2019.	
20.6	<u>Bill 2019-43</u>	1104 - 1114
	A by-law to set and levy the rates of taxation for Regional general and special purposes for the year 2019.	

20.7 Bill 2019-44

1115 -
1118

A by-law to adopt optional tools for the purposes of administering limits for the commercial, industrial and multi-residential property classes for the year 2019.

20.8 Bill 2019-45

1119

A by-law to adopt, ratify and confirm the actions of Regional Council at its meeting held on April 25, 2019.

21. ADJOURNMENT

If you require any accommodations for a disability in order to attend or participate in meetings or events, please contact the Accessibility Advisory Coordinator at 905-980-6000 (office), 289-929-8376 (cellphone) or accessibility@niagararegion.ca (email).

From: [PF-Mailbox-01](#)
To: [Lotimer, Kelly](#); [Norio, Ann-Marie](#); [Trennum, Matthew](#)
Subject: FW: Online Form - Request to Speak at a Standing Committee
Date: Friday, April 12, 2019 8:19:09 AM

From: Niagara Region Website
Sent: Friday, 12 April 2019 08:19:01 (UTC-05:00) Eastern Time (US & Canada)
To: Clerks
Subject: Online Form - Request to Speak at a Standing Committee

Request to Speak at a Standing Committee

To reply, copy the email address from below and put into 'To'. (if resident entered their email address)

Name

Julie Taffs

Address

[REDACTED]

City

St. Catharines

Postal

L2s1p5

Phone

[REDACTED]

Email

[REDACTED]

Organization

standing committee

Regional Council

Presentation Topic

Mental health, my story

Presentation includes slides

No

Previously presented topic

No

Presentation Details

I sent an email to Laura IP and she suggested I speak at the meeting on the 25th of April to tell my mental health journey story and to be an advocate for the barriers.

Video Consent

Yes



From: [PF-Mailbox-01](#)
To: [Lotimer, Kelly](#); [Norio, Ann-Marie](#); [Trennum, Matthew](#)
Subject: FW: Online Form - Request to Speak at a Standing Committee
Date: Friday, April 12, 2019 12:11:13 PM

From: Niagara Region Website
Sent: Friday, 12 April 2019 12:11:05 (UTC-05:00) Eastern Time (US & Canada)
To: Clerks
Subject: Online Form - Request to Speak at a Standing Committee

Request to Speak at a Standing Committee

To reply, copy the email address from below and put into 'To'. (if resident entered their email address)

Name

Lacey Willmott

Address

[REDACTED]

City

Fort Erie

Postal

L0S1S0

Phone

[REDACTED]

Email

[REDACTED]

Organization

standing committee

Regional Council

Presentation Topic

[REDACTED]

barrier

Presentation includes slides

No

Previously presented topic

No

Presentation Details

Greetings Clerk, I am a Niagara resident and concerned citizen, requesting to address Niagara Region council [REDACTED] barrier agenda item on April 25, 2019. I will be speaking from a personal position, and professional evaluation as a PhD researcher in health and social protection. Please confirm if I can be added to the agenda, and if require further information. Thank you.

Video Consent

Yes



From: [PF-Mailbox-01](#)
To: [Lotimer, Kelly](#); [Norio, Ann-Marie](#); [Trennum, Matthew](#)
Subject: FW: Online Form - Request to Speak at a Standing Committee
Date: Wednesday, April 17, 2019 10:29:38 PM

From: Niagara Region Website
Sent: Wednesday, 17 April 2019 22:29:29 (UTC-05:00) Eastern Time (US & Canada)
To: Clerks
Subject: Online Form - Request to Speak at a Standing Committee

Request to Speak at a Standing Committee

To reply, copy the email address from below and put into 'To'. (if resident entered their email address)

Name

Derek and Heather Tuba

Address

[REDACTED]

City

St. Catharines

Postal

L2N 3L7

Phone

[REDACTED]

Email

[REDACTED]

Organization

standing committee

Regional Council

Presentation Topic

Barriers on public infrastructure

Presentation includes slides

No

Previously presented topic

No

Presentation Details

My husband and I would like to address the effectiveness of barriers on public infrastructure as a primary implementation for suicide prevention.

Video Consent

Yes



From: [PF-Mailbox-01](#)
To: [Lotimer, Kelly](#); [Norio, Ann-Marie](#); [Trennum, Matthew](#)
Subject: FW: Online Form - Request to Speak at a Standing Committee
Date: Thursday, April 18, 2019 1:52:11 PM

From: Niagara Region Website
Sent: Thursday, 18 April 2019 13:52:06 (UTC-05:00) Eastern Time (US & Canada)
To: Clerks
Subject: Online Form - Request to Speak at a Standing Committee

Request to Speak at a Standing Committee

To reply, copy the email address from below and put into 'To'. (if resident entered their email address)

Name

Taylor Thomas

Address

[REDACTED]

City

St Catharines

Postal

L2S 0A9

Phone

[REDACTED]

Email

[REDACTED]

Organization

standing committee

Regional Council

Presentation Topic

Barriers on the [REDACTED]

Presentation includes slides

No

Previously presented topic

No

Presentation Details

I am seeking the direction from this council to fund the installation of barriers on

Video Consent

Yes



**THE REGIONAL MUNICIPALITY OF NIAGARA
PROCEEDINGS OF SPECIAL COUNCIL
OPEN SESSION**

**CL 7-2019
Thursday, March 28, 2019
Council Chamber
Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON**

Council: Bellows, Butters, Bradley (Regional Chair), Campion, Chiocchio, Darte, Diodati, Disero, Easton, Edgar, Fertich, Foster, Gale, Gibson, Greenwood, Heit, Huson, Ip, Nicholson, Redekop, Rigby, Steele, Ugulini, Whalen, Witteveen, Zalepa

Absent/Regrets: Bylsma, Jordan, Junkin, Insinna, Sendzik, Villella

Staff: T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, F. Meffe, Acting Director, Human Resources, A.-M. Norio, Regional Clerk, R. Tripp, Acting Chief Administrative Officer

Others Present: R. Weir, Borden Ladner Gervais LLP

1. CALL TO ORDER

Regional Chair Bradley called the meeting to order at 4:05 p.m.

2. ADOPTION OF AGENDA

Moved by Councillor Foster
Seconded by Councillor Steele

That the Special Council Agenda CL 07-2019, **BE ADOPTED.**

Carried

3. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

4. MOTION FOR CLOSED SESSION

Moved by Councillor Huson
Seconded by Councillor Gibson

That Council **DO NOW MOVE** into closed session for the purposes of receiving information of a confidential nature respecting:

Confidential Verbal Update - A Matter of Advice that is Subject to Solicitor-Client Privilege & A Matter of Litigation or Potential Litigation - Legal Advice respecting Litigation pertaining to Chief Administrative Officer & Senior Administration Officials Employment Contracts.

Carried

5. CLOSED SESSION

Council resolved into closed session at 4:07 p.m.

6. REPORT FROM CLOSED SESSION

Council reconvened in open session at 5:42 p.m. with the following individuals in attendance:

Council: Bellows, Butters, Bradley (Regional Chair), Campion, Chiocchio, Darte, Diodati, Disero, Easton, Edgar, Fertich, Foster, Gale, Gibson, Greenwood, Heit, Huson, Ip, Nicholson, Redekop, Rigby, Steele, Ugulini, Whalen, Witteveen, Zalepa

Absent/Regrets: Bylsma, Jordan, Junkin, Insinna, Sendzik, Villella

Staff: T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, F. Meffe, Acting Director, Human Resources, A.-M. Norio, Regional Clerk, R. Tripp, Acting Chief Administrative Officer

Others Present: R. Weir, Borden Ladner Gervais LLP

6.1 Confidential Verbal Update - A Matter of Advice that is Subject to Solicitor-Client Privilege & A Matter of Litigation or Potential Litigation - Legal Advice respecting Litigation pertaining to CAO & Senior Administration Officials Employment Contracts

Moved by Councillor Rigby
Seconded by Councillor Ugolini

That the Confidential Verbal Update respecting A Matter of Advice that is Subject to Solicitor-Client Privilege & A Matter of Litigation or Potential Litigation - Legal Advice respecting Litigation pertaining to Chief Administrative Officer & Senior Administration Officials Employment Contracts, **BE RECEIVED**.

Carried

7. **BY-LAWS**

7.1 Bill 2019-31

Moved by Councillor Witteveen
Seconded by Councillor Chiocchio

That the following Bill **BE NOW READ** and **DO PASS**:

Bill 2019-31

A by-law to adopt, ratify and confirm the actions of Regional Council at its special meeting held on March 28, 2019.

Carried

8. **ADJOURNMENT**

There being no further business, the meeting adjourned at 5:45 p.m.

Jim Bradley
Regional Chair

Ann-Marie Norio
Regional Clerk

**THE REGIONAL MUNICIPALITY OF NIAGARA
PROCEEDINGS OF COUNCIL
OPEN SESSION**

**CL 8-2019
Thursday, March 28, 2019
Council Chamber
Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON**

Council: Bradley (Regional Chair), Bellows, Butters, Bylsma, Campion, Chiocchio, Darte, Diodati, Disero, Easton, Edgar, Fertich, Foster, Gibson, Greenwood, Heit, Huson, Ip, Junkin, Nicholson, Redekop, Rigby, Sendzik, Steele, Ugulini, Whalen, Witteveen, Zalepa

Absent/Regrets: Gale, Jordan, Insinna, Villella

Staff: H. Chamberlain, Director, Financial Management & Planning/Deputy Treasurer, D. Gibbs, Director, Legal & Court Services, C. Habermehl, Acting Commissioner, Public Works, T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, A. Jugley, Commissioner, Community Services, V. Kuhns, Acting Director, Economic Development, F. Meffe, Acting Director, Human Resources, R. Mostacci, Commissioner, Planning & Development Services, A.-M. Norio, Regional Clerk, C. Ryall, Director, Transportation Services, K. Smith, Chief/Director, Niagara Emergency Medical Services, M. Trennum, Deputy Regional Clerk, R. Tripp, Acting Chief Administrative Officer

1. CALL TO ORDER

Regional Chair Bradley called the meeting to order at 6:34 p.m.

2. LAND ACKNOWLEDGMENT STATEMENT

Councillor Junkin read the Land Acknowledgment Statement.

3. MOMENT OF REFLECTION

Councillor Greenwood read the statement of reflection.

4. SINGING OF 'O CANADA'

Regional Chair Bradley asked all in attendance to stand for the singing of 'O Canada'.

5. ADOPTION OF AGENDA

Moved by Councillor Chiocchio
Seconded by Councillor Diodati

That Council Agenda CL 8-2019, **BE ADOPTED.**

Carried

6. DISCLOSURES OF PECUNIARY INTEREST

Councillor Diodati declared a direct pecuniary interest with respect to the portion of the Corporate Services Committee minutes CSC 03-2019 (Agenda Item 12.6) concerning Report CSD 14-2019 respecting Niagara Region Broadband Network (NRBN) Contract Update (Minute Item 5.2) as the item deals with the NRBN Contract and he is a member of the NRBN Board of Directors.

Councillor Heit declared an indirect pecuniary interest with respect to the portion of the Planning and Economic Development Services Committee minutes PEDC 03-2019 (Agenda Item 12.7) concerning the Modernizing Wine Sales in Ontario presentation (Minute Item 4.1) as the item deals with Ontario Craft Wineries and his daughter is employed at a Liquor Control Board of Ontario (LCBO) retail store.

7. PRESENTATIONS

There were no presentations.

8. CHAIR'S REPORTS, ANNOUNCEMENTS, REMARKS

Federal Budget released

The Regional Chair announced that the Government of Canada's new budget supports municipalities' local infrastructure priorities by proposing a one-time top-up of \$2.2 billion through the Federal Gas Tax Fund that will double the Government's commitment to municipalities in 2018-2019. Infrastructure investments include National Housing Strategy, which is helping more Canadians find a safe and affordable place to call home.

Canada Summer Games Torch Ceremonies

Chair Bradley advised that he joined a delegation from Niagara in Red Deer, Alberta to accept the flag and cauldron of the Canada Games which will be coming to Niagara Region in 2021. He noted the Summer Games are unifying the region, exposing more people to Niagara and what we have to offer.

Housing Announcement with MP Vance Badaway

Regional Chair Bradley advised that he joined Niagara Centre MP Vance Badaway, along with members of Council and staff, for the announcement of almost \$6 million for new housing builds in Welland on behalf of the Minister of Families, Children and Social Development Jean-Yves Duclos. Construction is scheduled to finish in the spring of 2020 and will house roughly 50 families.

Mid-Peninsula Corridor Meetings

The Regional Chair stated he also attended meetings with Niagara Centre MP Vance Badaway respecting the Mid-Peninsula Corridor and the impacts on the economy, infrastructure and the residents of Niagara, allowing for a greater flow of goods and people through our highways and bridges.

Empty Bowls Event in Support of Bethlehem Housing and Support Services

Chair Bradley advised that he represented the Region at the Empty Bowls event in support of Bethlehem Housing and Support Services, which strives to end homelessness and reduce the impact of poverty across the Niagara region.

Niagara Health Services/Brock University Partners for Better Health and Wellbeing

Regional Chair Bradley announced the Better Health and Wellbeing initiative, a project aimed at improving the overall health and well-being of Niagara residents. He advised this new partnership between the Niagara Health System and Brock University will create training and employment opportunities for Brock Students and graduates.

Top Hat Ceremony

The Chair announced the opening of the Welland Canal and that he participated in the top hat ceremony, which welcomed the first vessel through the canal for the 2019 season.

St. Catharines – State of the City

The Regional Chair advised that he attended the City of St. Catharines' State of the City address, where Mayor Sendzik shared his optimism for the future of St. Catharines. The Chair shared his desire to build upon the momentum of St. Catharines to continue the positive changes and development that has taken place these past few years.

Niagara Falls Recycling Centre

Regional Chair Bradley advised that he recently had the opportunity to tour the Niagara Falls recycling center and that he was encouraged by the staff and their strong work ethic in ensuring the Region has a positive environmental impact on Niagara by reducing waste in our landfills.

Niagara Chamber Partnership

The Chair advised that he spoke at the Building Niagara Together conference respecting the improvement of services and quality of life for Niagara Residents that was held by the Niagara Chamber Partnership. He indicated a need to continue to build on the successes of our team while the Region works with local area municipalities on plans to deliver an enhanced transit system for the entire Region.

Niagara Industrial Association AGM

Regional Chair Bradley advised that he attended the Niagara Industrial Association annual general meeting with Mayors Diodati and Sendzik. He noted that the Niagara Industrial Association advocates and promotes on behalf of local industry and addresses the issues that inhibit its advancement.

State of the Region

The Chair announced that his inaugural address to the business community and the State of the Region will be delivered on April 3, 2019. He expressed the importance of continued efforts to foster partnerships with the business community for the betterment of the entire Niagara region, and his desire for this event to allow for greater teamwork and partnerships in 2019.

9. DELEGATIONS

There were no delegations.

10. ADOPTION OF MINUTES

10.1 Council Minutes CL 6-2019

Thursday, February 28, 2019

Moved by Councillor Disero

Seconded by Councillor Bylsma

That Minutes CL 06-2019 being the Open Session minutes of the Regional Council meeting held on Thursday, February 28, 2019, **BE ADOPTED.**

Carried

11. CORRESPONDENCE

11.1 Receive and/or Refer

Moved by Councillor Butters
Seconded by Councillor Junkin

That the following items **BE DEALT WITH** as follows:

CL-C 21-2019 respecting Notice of Procedural By-law Amendment, **BE RECEIVED**.

CL-C 22-2019 respecting By-law to Amend - Fees and Charges By-law 2019-28, **BE RECEIVED**.

Carried

11. CORRESPONDENCE

11.2 For Consideration

11.2.1 CLK 07-2019

Appointment of Community Member to the Niagara Regional Police Services Board

Moved by Councillor Gibson
Seconded by Councillor Darté

That Report CLK 07-2019, dated March 28, 2019, respecting Appointment of Community Member to the Niagara Regional Police Services Board, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the recommendation contained in Confidential Appendix I to Report CLK 07-2019 **BE APPROVED**; and
2. That Henry D'Angela **BE APPOINTED** to the Niagara Police Services Board for the remainder of this term of Council (March 28, 2019 until November 14, 2022) or until a successor is appointed.

Carried

11.2.2 CLK 08-2019

Use of Committee Room 4 - Regional Council Ante Room

Moved by Councillor Ip

Seconded by Councillor Chiocchio

That Report CLK 08-2019, dated March 28, 2019, respecting Use of Committee Room 4 - Regional Council Ante Room, **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That Regional Council **APPROVE** the use of the Council Chamber for Standing Committee and Council meetings that are closed to the public.

Carried

11.2.3 CL-C 23-2019

Association of Municipalities of Ontario (AMO) Board of Directors Endorsement

Moved by Councillor Whalen

Seconded by Councillor Bylsma

That Correspondence Item CL-C 23-2019, being a memorandum from A.-M. Norio, Regional Clerk, dated March 28, 2019, respecting Association of Municipalities of Ontario (AMO) Board of Directors Endorsement, **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That Regional Council **ENDORSE** Councillor Robert Foster as a candidate for the Association of Municipalities of Ontario Board of Directors.

Carried

11.2.4 CL-C 24-2019

Vacancy on the Linking Niagara Transit Committee

Moved by Councillor Fertich

Seconded by Councillor Witteveen

That Correspondence Item CL-C 24-2019, being a memorandum from A.-M. Norio, Regional Clerk, dated March 28, 2019, respecting Vacancy on the Linking Niagara Transit Committee, **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That Councillor Sendzik **BE APPOINTED** to the Linking Niagara Transit Committee, effective immediately.

Carried

11.2.5 CL-C 25-2019

Request for Appointment to the Waste Management Planning Steering Committee

Moved by Councillor Heit
Seconded by Councillor Bylsma

That Correspondence Item CL-C 25-2019, being a memorandum from A.-M. Norio, Regional Clerk, dated March 28, 2019, respecting Request for Appointment to the Waste Management Planning Steering Committee, **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That Councillor Fertich **BE APPOINTED** to the Waste Management Planning Steering Committee.

Carried

11.2.6 CL-C 26-2019

Standing Committee Appointment

Moved by Councillor Huson
Seconded by Councillor Steele

That Correspondence Item CL-C 26-2019, being a memorandum from A.-M. Norio, Regional Clerk, dated March 28, 2019, respecting Standing Committee Appointment, **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That Councillor Witteveen **BE APPOINTED** to the Planning and Economic Development Committee, effective immediately.

Carried

11.2.7 CL-C 27-2019

Request for Appointment to the Humberstone Landfill Site Public Liaison Committee

Moved by Councillor Campion
Seconded by Councillor Diodati

That Correspondence Item CL-C 27-2019, being a memorandum from A.-M. Norio, Regional Clerk, dated March 28, 2019, respecting Request for Appointment to the Humberstone Landfill Site Public Liaison Committee, **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That Councillor Chiocchio **BE APPOINTED** to the Humberstone Landfill Site Public Liaison Committee.

Carried

12. COMMITTEE REPORTS - OPEN SESSION

12.1 Budget Review Committee of the Whole

Minutes BRCOTW 05-2019, Thursday, February 28, 2019

Moved by Councillor Zalepa
Seconded by Councillor Bylsma

That Report BRCOTW 05-2019 being the Open Session minutes of the Budget Review Committee of the Whole meeting held on Thursday February 28, 2019, **BE RECEIVED** and the recommendations contained therein **BE APPROVED** save and except Minute Item 5.1.

Carried

12.2 Committee of the Whole

Minutes COTW 01-2019, Thursday, March 7, 2019

Moved by Councillor Bylsma
Seconded by Councillor Foster

That Report COTW 01-2019, being the Open Session minutes of the Committee of the Whole meeting held on Thursday, March 7, 2019, **BE RECEIVED** and the recommendations contained therein **BE APPROVED**.

Carried

12.3 Audit Committee

Minutes AC 02-2019, Monday, March 18, 2019

Moved by Councillor Rigby
Seconded by Councillor Bellows

That Report AC 02-2019, being the Open Session minutes of the Audit Committee meeting held on Monday, March 18, 2019, **BE RECEIVED** and the recommendations contained therein **BE APPROVED**.

Carried

12.4 Public Works Committee

Minutes PWC 03-2019, Tuesday, March 19, 2019

Moved by Councillor Rigby
Seconded by Councillor Bellows

That Report PWC 03-2019 being the Open and Closed Session minutes of the Public Works Committee meeting held on Tuesday, March 19, 2019, **BE RECEIVED** and the recommendations contained therein **BE APPROVED**.

Carried

12.5 Public Health and Social Services Committee

Minutes PHSSC 03-2019, Tuesday, March 19, 2019

Moved by Councillor Chiocchio
Seconded by Councillor Greenwood

That Report PHSSC 03-2019 being the Open Session minutes of the Public Health & Social Services Committee meeting held on Tuesday, March 19, 2019, **BE RECEIVED** and the recommendations contained therein **BE APPROVED**.

Carried

12.6 Corporate Services Committee

Minutes CSC 03-2019, Wednesday, March 20, 2019

Moved by Councillor Foster
Seconded by Councillor Edgar

That Report CSC 03-2019 being the Open and Closed Session minutes of the Corporate Services Committee meeting held on Wednesday, March 20, 2019, **BE RECEIVED** and the recommendations contained therein **BE APPROVED**.

12.6.1 Minute Item 5.1 respecting 2018 Year End Results and Transfer Report

The recommendations respecting 2018 Year End Results and Transfer Report contained in Minutes Item 5.1 were considered separately as follows:

That Report CSD 21-2019, dated March 20, 2019, respecting 2018 Year End Results and Transfer Report, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the unaudited summarized results of the Niagara Region as detailed in Appendix 2 of Report CSD 21-2019, **BE RECEIVED** as follows:

Levy Programs	(\$1.7) Million
Niagara Regional Police (NRPS)	\$0.5 Million
Niagara Regional Housing (NRH)	\$2.6 Million
Court Services	<u>\$0.4 Million</u>
Levy Supported Surplus	<u>\$1.8 Million</u>

2. A) That \$600,000 of the 2018 Year End Surplus **BE TRANSFERRED** to the 2019 Operating Budget as a one time source of funding for the Smarter Niagara Incentive Program;

B) That \$1.2 million of the surplus **BE TRANSFERRED** to the taxpayer relief reserve fund and **BE ALLOCATED** for potential future housing initiatives to be approved by Council;

3. That the 2018 year end operating surplus for rate supported programs of \$3.6 million **BE TRANSFERRED** to reserves as follows:
 - \$1.0 million surplus related to Waste Management **BE TRANSFERRED** to the Waste Management Stabilization Reserve
 - \$0.5 million surplus related to Waste Management **BE TRANSFERRED** to the Waste Management Landfill Liability Reserve

- \$0.4 million **BE TRANSFERRED** from the Wastewater Stabilization Reserve to offset the deficit incurred relating to Wastewater services
 - \$0.1 million surplus related to the water service **BE TRANSFERRED** to the Water Stabilization Reserve
 - \$2.4 million surplus related to the water service **BE TRANSFERRED** to the Water Capital Reserve; and
4. That encumbrances of \$19.5 million, Appendix 1 of Report CSD 21-2019, **BE APPROVED** and that the deferral of these expenditures be included in the 2019 operating budget.

Moved by Councillor Sendzik
Seconded by Councillor Butters

That clause 2 b) **BE AMENDED** as follows:

That \$1.2 million of the surplus ***REMAIN in the Niagara Regional Housing budget and be utilized for housing, social housing and community services housing initiatives.***

The following friendly ***amendment*** was accepted by the Regional Chair, and the mover and seconder of the motion:

That clause 2 b) **BE AMENDED** as follows:

That \$1.2 million of the surplus **REMAIN** in the Niagara Regional Housing budget and be utilized for ***new*** housing, ***new*** social housing and ***new*** community services housing initiatives.

The Regional Chair called the vote on the amendment as follows:

That clause 2 b) **BE AMENDED** as follows:

That \$1.2 million of the surplus **REMAIN** in the Niagara Regional Housing budget and be utilized for new housing, new social housing and new community services housing initiatives.

Recorded Vote:

Yes (23): Bellows, Butters, Campion, Chiocchio, Darte, Diodati, Disero, Edgar, Fertich, Gibson, Greenwood, Heit, Huson, Junkin, Nicholson, Redekop, Rigby, Sendzik, Steele, Ugulini, Whalen, Witteveen, Zalepa.

No (4): Bylsma, Easton, Foster, Ip.

Carried

The Regional Chair called the vote on the motion, as amended, as follows:

That Report CSD 21-2019, dated March 20, 2019, respecting 2018 Year End Results and Transfer Report, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the unaudited summarized results of the Niagara Region as detailed in Appendix 2 of Report CSD 21-2019, **BE RECEIVED** as follows:

Levy Programs	(\$1.7) Million
Niagara Regional Police (NRPS)	\$0.5 Million
Niagara Regional Housing (NRH)	\$2.6 Million
Court Services	<u>\$0.4 Million</u>
Levy Supported Surplus	<u>\$1.8 Million</u>

2. A) That \$600,000 of the 2018 Year End Surplus **BE TRANSFERRED** to the 2019 Operating Budget as a one time source of funding for the Smarter Niagara Incentive Program;

B) That \$1.2 million of the surplus **REMAIN** in the Niagara Regional Housing budget and be utilized for new housing, new social housing and new community services housing initiatives;
3. That the 2018 year end operating surplus for rate supported programs of \$3.6 million **BE TRANSFERRED** to reserves as follows:

- \$1.0 million surplus related to Waste Management **BE TRANSFERRED** to the Waste Management Stabilization Reserve
 - \$0.5 million surplus related to Waste Management **BE TRANSFERRED** to the Waste Management Landfill Liability Reserve
 - \$0.4 million **BE TRANSFERRED** from the Wastewater Stabilization Reserve to offset the deficit incurred relating to Wastewater services
 - \$0.1 million surplus related to the water service **BE TRANSFERRED** to the Water Stabilization Reserve
 - \$2.4 million surplus related to the water service **BE TRANSFERRED** to the Water Capital Reserve; and
4. That encumbrances of \$19.5 million, Appendix 1 of Report CSD 21-2019, **BE APPROVED** and that the deferral of these expenditures be included in the 2019 operating budget.

Carried

12.6.2 Balance of the recommendations from Corporate Services Committee

The Regional Chair called the vote on the balance of the recommendations from the Corporate Services Committee and declared it,

Carried

12.7 Planning and Economic Development Committee

Minutes PEDC 03-2019, Wednesday, March 20, 2019

Moved by Councillor Huson
Seconded by Councillor Gibson

That Report PEDC 03-2019 being the Open Session minutes of the Planning & Development Committee meeting held on Wednesday, March 20, 2019, **BE RECEIVED** and the recommendations contained therein **BE APPROVED**.

12.7.1 Minute Item 4.1 respecting Modernizing Wine Sales in Ontario

The recommendation respecting Modernizing Wine Sales in Ontario contained in Minute Item 4.1 was considered separately as follows:

That the Regional Chair **BE DIRECTED** to send a letter to the Province of Ontario in support of the recommendations outlined in the presentation respecting Modernizing Wine Sales in Ontario.

The Regional Chair called the vote on the motion and declared it,

Carried

12.7.2 Balance of the Recommendations from Planning and Economic Development Committee

The Regional Chair called the vote on the balance of the recommendations from the Planning and Economic Development Committee, save and except Minute Item 10.1, and declared it,

Carried

13. CHIEF ADMINISTRATIVE OFFICER'S REPORT(S)

13.1 CAO 1-2019

Chief Administrative Officer Recruitment Options

Moved by Councillor Redekop

Seconded by Councillor Heit

That Item CAO 01-2019, being a memorandum from R. Tripp, Acting Chief Administrative Officer, dated March 28, 2019, respecting Chief Administrative Officer Recruitment Options, **BE RECEIVED** for information.

Carried

13.2 CAO 2-2019

Provincial Review of Regional Government

Moved by Councillor Sendzik

Seconded by Councillor Gibson

That Item CAO 02-2019, being a memorandum from R. Tripp, Acting Chief Administrative Officer, dated March 28, 2019, respecting Provincial Review of Regional Government, **BE RECEIVED** for information.

Carried

14. MOTIONS

14.1 Meeting Time for the Public Health and Social Services Committee

The Regional Chair advised Members that as this was a reconsideration, it would require a two-thirds majority to pass.

Moved by Councillor Greenwood

Seconded by Councillor Chiocchio

That the 2019 Legislative Schedule of Regular Meetings **BE RECONSIDERED** at this time.

Carried

Moved by Councillor Greenwood

Seconded by Councillor Chiocchio

Whereas section 22.2 of Niagara Region Procedural By-law provides that Standing Committees shall meet on the days and times according to the schedule set annually and approved by Council;

Whereas on December 13, 2018, Regional Council approved the 2019 Legislative Schedule of Regular Meetings;

Whereas in accordance with the Legislative Schedule of Regular Meetings, the Public Health and Social Services Committee meetings are held on Tuesdays at 1:00 p.m.;

WHEREAS the Public Health and Social Services Committee Co-Chairs wish to reconsider the time of the Public Health and Social Services Committee meetings.

NOW THEREFORE BE IT RESOLVED:

That, effective immediately, Public Health and Social Services Committee meetings **BE HELD** on Tuesdays at 2:00 p.m.

Carried

15. NOTICES OF MOTION

There were no notices of motion.

16. OTHER BUSINESS

There were no items of other business.

17. MOTION FOR CLOSED SESSION

Moved by Councillor Huson
Seconded by Councillor Bellows

That this Council **DO NOW MOVE** into Closed Session for the purposes of receiving information of a confidential nature respecting:

A Matter Respecting Litigation or Potential Litigation – Appeal to the Local Planning Appeal Tribunal for Welland Committee of Adjustment Decision on Minor Variance A01/2019, 37 Niagara Street, City of Welland

Carried

18. CLOSED SESSION

Council resolved into closed session at 7:57 p.m.

19. REPORT FROM CLOSED SESSION

Council reconvened in open session at 8:30 p.m. with the following individuals in attendance:

Council: Bradley (Regional Chair), Bellows, Butters, Bylsma, Campion, Chiocchio, Darte, Diodati, Disero, Easton, Edgar, Fertich, Foster, Gale, Gibson, Greenwood, Heit, Huson, Ip, Junkin, Nicholson, Redekop, Rigby, Sendzik, Steele, Ugulini, Whalen, Witteveen, Zalepa

Absent/Regrets: Jordan, Insinna, Villella

Staff: D. Gibbs, Director, Legal & Court Services, C. Habermebl, Acting Commissioner, Public Works, T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, A. Jugley, Commissioner, Community Services, R. Mostacci, Commissioner, Planning & Development Services, A.-M. Norio, Regional Clerk, M. Trennum, Deputy Regional Clerk, R. Tripp, Acting Chief Administrative Officer

19.1 Planning and Economic Development Committee Minute Item 10.1 - Confidential Report PDS 15-2019

A Matter Respecting Litigation of Potential Litigation – Appeal to the Local Planning Appeal Tribunal for Welland Committee of Adjustment Decision on Minor Variance A01/2019, 37 Niagara Street, City of Welland

Moved by Councillor Steele
Seconded by Councillor Bellows

That Confidential Report PDS 15-2019, dated March 20, 2019, respecting A Matter Respecting Litigation of Potential Litigation – Appeal to the Local Planning Appeal Tribunal for Welland Committee of Adjustment Decision on Minor Variance A01/2019, 37 Niagara Street, City of Welland, **BE RECEIVED**; and

That staff **PROCEED** as directed in closed session.

Carried

20. BY-LAWS

Moved by Councillor Witteveen
Seconded by Councillor Greenwood

That the following Bills **BE NOW READ** and **DO PASS**:

Bill 2019-32

A by-law to amend By-law No. 2019-28, being a by-law to establish fees and charges for services and activities provided by The Regional Municipality of Niagara and for the use of its property and to repeal By-law No. 2017-111.

Bill 2019-33

A by-law to accept, assume and dedicate Part of lot 117, Plan M1, in the Town of Niagara-on-the-Lake as part of Regional Road No. 87 (Lakeshore Road).

Bill 2019-34

A by-law to authorize the execution of amending funding agreements with Her Majesty the Queen in Right of the Province of Ontario and Her Majesty the Queen in Right of Canada related to the New Niagara-on-the-Lake Wastewater Treatment Plant Expansion and Relocation Project.

Bill 2019-35

A by-law to exempt local Official Plan Amendments (LOPAs) from Regional approval and to repeal By-law Nos. 129-2001 and 43-2002.

Bill 2019-36

A by-law to amend By-law No. 120-2010, the Procedural By-law (amend Appendix A).

Bill 2019-37

A by-law to adopt, ratify and confirm the actions of Regional Council at its meeting held on March 28, 2019.

Bill 2019-36 was considered separately as follows:

That Bill 2019-36, being a by-law to amend By-law No. 120-2010, the Procedural By-law (amend Appendix A) **BE NOW READ** and **DO PASS**.

Two-thirds majority having been achieved, the Regional Chair declared the vote,

Carried

The Regional Chair called the vote on the balance of the motion and declared it,

Carried

21. ADJOURNMENT

There being no further business, the meeting adjourned at 8:35 p.m.

Jim Bradley
Regional Chair

Matthew Trennum
Deputy Regional Clerk

Ann-Marie Norio
Regional Clerk

MEMORANDUM

CL-C 27- 2019

Subject: Triple Majority Achieved for By-law No. 2019-07 being a by-law to amend By-law 112-2013 being a by-law to protect children and vulnerable persons from exposure to outdoor second-hand smoke.

Date: April 25, 2019

To: Regional Council

From: Ann-Marie Norio, Regional Clerk

Regional Council, at its meeting held on January 17, 2019, passed By-law No. 2019-07 being a by-law to amend By-law 112-2013 being a by-law to protect children and vulnerable persons from exposure to outdoor second-hand smoke.

In accordance with section 115(5) of the *Municipal Act, 2001* a by-law passed under subsection 115(1) of the *Act*, shall not come into force unless,

- (a) a majority of all votes on the Council of the upper-tier municipality are cast in its favour;
- (b) a majority of the Councils of all the lower-tier municipalities forming part of the upper-tier municipality for municipal purposes have passed resolutions giving their consent to the by-law; and
- (c) the total number of electors in the lower-tier municipalities that have passed resolutions under clause (b) form a majority of all the electors in the upper- tier municipality.

This memorandum confirms that all of the above provisions have been met and the effective date of By-law No. 2019-07 was March 19, 2019.

For your reference a summary of the local area municipal responses and By-law No. 2019-07 are attached as Appendix 1 and 2 respectively.

Respectfully submitted and signed by

Ann-Marie Norio
Regional Clerk

Response Summary
CLK-C 39-2019
Amendments to By-law No. 112-2013
A by-law to protect vulnerable people from second-hand smoke
PHD 2-2019 Revised
Minute Item 6.2, PHSSC 1-2019, January 8, 2019

Municipality	Dated	Response	Population	Eligible Electors
*as of the 2018 Municipal Election			447,888	326,684
Fort Erie	2019-02-12	Consents to the amendments	30,710	23,460
Grimsby			27,314	20,398
Lincoln	2019-04-17	Consents to the amendments	23,787	16,974
Niagara Falls	2019-03-27	Consents to the amendments	88,071	60,892
Niagara-on-the-Lake	2019-02-14	Consents to the amendments	17,511	14,237
Pelham	2019-02-08	Refer to staff to review and report back	0	0
Pelham	2019-02-21	Consents to the amendments	17,110	13,910
Port Colborne			18,306	15,208
St. Catharines	2019-03-19	Consents to the amendments	133,113	92,133
Thorold	2019-02-21	Consents to the amendments	18,801	14,471
Wainfleet	2019-02-19	Consents to the amendments	6,372	5,786
Welland	2019-02-13	Consents to the amendments	52,293	37,879
West Lincoln	2019-01-29	Consents to the amendments	14,500	11,336
Overall Total			402,268	291,078
Percentage			89.8%	89.1%
Thorold	2019-02-21	Triple majority of area municipalities achieved	157,297	121,079
			35.11%	37.06%
St. Catharines	2019-03-19	Triple majority of eligible electors achieved	290,410	213,212
			64.83%	65.26%



Administration

Office of the Regional Clerk

1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

Telephone: 905-980-6000 Toll-free: 1-800-263-7215 Fax: 905-687-4977

www.niagararegion.ca

January 23, 2019

AREA MUNICIPAL CLERKS

SENT ELECTRONICALLY

**Re: Notice of Passing of By-law to Amend By-law 112-2013 Being a By-law to Protect Children and Vulnerable Persons from Exposure to Outdoor Second-Hand Smoke - Triple Majority Requirement
PHD 02-2019, January 8, 2019**

Regional Council, at its meeting of January 17, 2019, approved the following recommendation of its Public Health and Social Services Committee:

1. That By-law No. 112-2013 **BE UPDATED** to harmonize with the Smoke Free Ontario Act to include vaping and cannabis, as an interim measure for consistency, with an appropriate sunset clause;
2. That staff **BE DIRECTED** to consult with the Local Area Municipalities (LAMs) and the public to build a consensus on an updated regional by-law to protect children and vulnerable persons from exposure to outdoor second-hand smoke;
3. That staff **BE DIRECTED** to report back to PHSSC in a timely manner on the learnings from this consultation with the recommended next steps.

By-law No. 2019-07 was subsequently passed; however, the by-law is not valid until triple majority status is achieved.

Pursuant to Section 115(5) of the *Municipal Act, 2001*, a by-law passed under subsection 115(1) shall not come into force unless:

- a) A majority of all votes on the Council of the upper-tier municipality are cast in its favour;
- b) A majority of the Councils of all the lower-tier municipalities forming part of the upper-tier municipality for municipal purposes have passed resolutions giving their consent to the by-law; and

- c) The total number of electors in the lower-tier municipalities that have passed resolutions under clause (b) form a majority of all the electors in the upper-tier municipality.

Section 219(5) of the *Municipal Act, 2001* defines “elector” as a person whose name appears on the voters’ list, as amended up until the close of voting on voting day, for the last regular election preceding the coming into force of the by-law.

The number of electors as defined above for each area municipality is set out below. In the event your number is incorrect, please advise me as soon as possible.

Local Area Municipality	Population	Eligible Electors
Fort Erie	30,710	23,460
Grimsby	27,314	20,398
Lincoln	23,787	16,974
Niagara Falls	88,071	60,892
Niagara-on-the-Lake	17,511	14,237
Pelham	17,110	13,910
Port Colborne	18,306	15,208
St. Catharines	133,113	92,133
Thorold	18,801	14,471
Wainfleet	6,372	5,786
Welland	52,293	37,879
West Lincoln	14,500	11,336
Total for Region	447,888	326,684

*as of the 2018 Municipal Election

We respectfully request that you place this matter before your Council at your earliest opportunity to consider a resolution consenting to the by-law and advise accordingly of the action taken by your Council.

A copy of Report PHD 02-2019 *REVISED* and By-law No.2019-07 are enclosed for your information.

Thanking you in advance for your assistance and should you require anything further, please do not hesitate to contact me.

Yours truly,

A handwritten signature in dark ink, appearing to read 'Ann Marie' followed by a stylized flourish.

Ann-Marie Norio
Regional Clerk

CLK-C 2019-39

Subject: Outdoor Second-hand Smoking By-law Amendment – **REVISED**

Report to: Public Health and Social Services Committee

Report date: Tuesday, January 8, 2019

Recommendations

1. ***That By-law No. 112-2013 BE UPDATED to harmonize with the Smoke Free Ontario Act to include vaping and cannabis, as an interim measure for consistency, with an appropriate sunset clause;***
2. That staff **BE DIRECTED** to consult with the Local Area Municipalities (LAMs) on revisions to By-law No. 112-2013 ***and the public to build a consensus on an updated*** regional by-law to protect children and vulnerable persons from exposure to outdoor second-hand smoke as follows; and
 - a) ~~Addition of cannabis and e-cigarettes to substances prohibited from use in public outdoor spaces.~~
 - b) ~~Addition to the list of prohibited places of use including nine metres from any public building entrance and/or exit.~~
3. That staff **BE DIRECTED** to report back to PHSSC in a timely manner on the learnings from this consultation with the recommended next steps.

Key Facts

- The Province of Ontario passed the *Smoke-Free Ontario Act, 2017 (SFOA)*, which prohibits spaces where individuals can smoke or vape. Changes to this legislation expand beyond tobacco to include cannabis and all vaping products.
- Niagara's By-Law No. 112-2013 aims to protect children and vulnerable persons from exposure to outdoor second-hand tobacco smoke, which does not address the second-hand smoke exposure to cannabis or second-hand vapour exposure from ***electronic*** e-cigarettes through outdoor spaces.
- Local data suggests support in Niagara to harmonize the Regional By-law with SFOA by including vaping and cannabis, in addition to tobacco, ~~as well as support for restrictions around entrances and exits.~~ ***as an interim measure to ensure consistency and avoid confusion***
- Consultation internally, across Regional departments is important, ~~as well as consultation with the LAMs~~ ***and the public, is important to assess support to develop the next version of the Regional By-law, by consensus across all municipalities.***

Financial Considerations

The Ministry of Health and Long Term Care (MOHLTC) provides multiple funding sources to support the Smoke-Free Ontario strategy at 100% with the approved budget of \$668,600 for 2018. This funding supports five FTE Tobacco Control Officers (TCO) responsible for the promotion, education, enforcement of the *SFOA* and Niagara Region's By-law 112-2013.

The province has announced that it will provide \$40 million over two years to help municipalities with costs related to the legalization of cannabis.¹ In the first phase, \$15 million is to be disbursed in early January 2019, this has been allocated for each municipality. The allocation of these funds to Public Health will be determined once funding amounts have been finalized.

NRPH & ES received 281 complaints, requests and inquiries related to tobacco, cannabis and e-cigarette products in 2018. Of these calls, 82 were complaints related to use of tobacco products being used in places thought to be prohibited places. NRPH & ES has requested funding from MOHLTC to support increased staff time related to cannabis enforcement and prevention work. At the time of writing this report there has been no response to the funding request.

Analysis

SFOA, 2017 Updates

The *SFOA* restricts tobacco sale, supply and places of use; changes to the *SFOA* now include cannabis and vaping products in those restrictions.

SFOA Prohibited Place Examples

- Enclosed public places
- Enclosed work places
- Condos, apartment buildings and university/college residents
 - Application: Common areas
- Playgrounds
 - Application: Perimeter plus 20 metres
- Sports fields
 - Application: Patio plus 20 metres
- Restaurant bar patios
 - Application: Patio plus nine metres

¹ Fedeli, V. Ontario Cannabis Legalization Implementation Fund — Heads of Council Letter [Internet]. Toronto, ON: Ministry of Finance; 2018 [cited 2018 Dec 10]. Available from: <https://www.fin.gov.on.ca/en/budget/oclif/>

- Hospitals, psychiatric facilities, community health facilities
 - Application: Grounds of facility
- Child care Centre
 - Application: Grounds of facility

Niagara's By-Law No. 112-2013

Tobacco

In 2012, NRPH & ES conducted public consultations and found that 88% of the 1,907 Niagara residents surveyed supported a by-law restricting smoking in outdoor public settings.² In order to protect the public from second-hand exposure to outdoor smoke, Niagara passed By-law No. 112-2013, which prohibits smoking tobacco on the grounds of all municipal and regional properties, parks, playground, sports fields, splash pads, outdoor pools, arenas and bus shelters. The by-law has a strong focus on protecting children and youth, and this includes denormalization. Also, those who wish to quit find that fewer visual cues and denormalization of smoking is helpful.

Strengthening local by-laws to reduce second-hand exposure to tobacco in outdoor spaces, has been ranked as a highly impactful policy change to protect the public from tobacco smoke.³ ~~Prohibiting tobacco and cannabis smoke and vaping of any product within nine metres of public entrances and exits will be a consideration during consultations.~~

Beyond tobacco, the *SFOA* now prohibits the use of cannabis and e-cigarettes in public spaces. The benefits of aligning the By-law No. 112-2013 with the *SFOA* by the inclusion of cannabis and e-cigarettes are:

1. Protecting individuals, especially children and vulnerable populations from second-hand smoke exposure
2. Preventing the normalization of tobacco, cannabis, e-cigarette use amongst youth
3. Creating supportive environments for individuals that are motivated to quit or cut back from use of tobacco, cannabis or e-cigarettes

Cannabis

² Smoke-Free Outdoor Spaces Public Consultation Report, Niagara Region Public Health [Summer 2012]

³ Smoke-Free Ontario Scientific Advisory Committee. Evidence to Guide Action: Comprehensive tobacco control in Ontario [Internet]. Toronto, ON: Public Health Ontario [cited 2018 Dec 10]. Available from: <https://www.publichealthontario.ca/en/BrowseByTopic/ChronicDiseasesAndInjuries/Pages/smoke-free-ontario.aspx>

Cannabis has been criminalized in Canada since 1923, yet prior to legalization 46.4% of adults in Niagara indicated that they have used cannabis at least once in their lifetime and 12.2% used cannabis in the past 12 months.⁴ Within Niagara's secondary schools 35% have used cannabis in the past 12 months and 23% have used cannabis in the past 4 weeks.⁵ The Canadian Cannabis Survey (2018) included 12,958 respondents and found the most common form of consumption of cannabis was through smoking (89%), followed by edibles (42%), and e-cigarettes (26%).⁶ Research has found that second-hand exposure to cannabis smoke and tobacco smoke have similar chemical composition.^{7, 8} Holitzki et. al recommend an alignment in tobacco and cannabis policy by prohibiting outdoor spaces where products can be used.⁹ *Including cannabis as a prohibited drug to smoke or vape into the amended by-law will be a consideration during consultations.*

E-cigarettes

Electronic Cigarettes are known as e-cigarettes, e-cigs or vapes, and typically include a rechargeable battery, a heating element, and an e-juice containing chemical ingredients, which forms a vapour when inhaled. E-cigarettes do not contain tobacco but generally contain nicotine, which may lead to addiction in those who vape but aren't smokers. E-cigarettes contain more than 80 compounds, such as particles, metals, nitrosamines, carbonyls, and flavourings.¹⁰ While the long-term health effects from e-cigarette use are still unknown, some research indicates that use can lead to lung damage, and short-term health effects can include increased heart rate, increased blood pressure, increased airway resistance, decreased airway conductance.¹¹ In Niagara, 25% of secondary students have used an e-cigarette in the past 12 months.¹² The Ontario Student Drug Use and Health Survey found that 61% of secondary students believe there is no risk from regular e-cigarette use.¹³ ~~Including e-cigarettes as~~

⁴ Canadian Community Health Survey [2015-2016]

⁵ Ontario Student Drug Use and Health Survey, Centre for Addiction and Mental Health [2015]

⁶ Canadian Cannabis Survey 2018 Summary. Government of Canada. [cited 2018 Dec 10]. Available from: <https://www.canada.ca/en/services/health/publications/drugs-health-products/canadian-cannabis-survey-2018-summary.html>

⁷ Maertens RM, White PA, Williams A, et al. A global toxicogenomic analysis investigating the mechanistic differences between tobacco and marijuana smoke condensates in vitro. *Toxicology* 2013;308:60-73.

⁸ Maertens RM, White PA, Rickert W, et al. The genotoxicity of mainstream and sidestream marijuana and tobacco smoke condensates. *Chem Res Toxicol* 2009;22:1406-14.

⁹ Holitzki, H., Dowsett, L.E., Spackman, E., Noseworthy, T., Clement, T., Health effects of exposure to second- and third-hand marijuana smoke: A systematic review [Internet] *Canadian Medical Association Journal Open*, 2017: Oct-Dec, 5(4): E814-E822. [cited 2018 Dec 10]. Available from: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5741419/>

¹⁰ Tobacco and Public Health: From Theory to Practice, E-Cigarettes Module [Internet], Toronto, ON, Ontario Tobacco Research Unit [cited Dec 11]. Available from: <https://tobaccocourse.otru.org/course/>

¹¹ Tobacco and Public Health: From Theory to Practice, E-Cigarettes Module [Internet], Toronto, ON, Ontario Tobacco Research Unit [cited Dec 11]. Available from: <https://tobaccocourse.otru.org/course/>

¹² Ontario Student Drug Use and Health Survey, Centre for Addiction and Mental Health [2015]

¹³ Ontario Student Drug Use and Health Survey, Centre for Addiction and Mental Health [2015]

~~a prohibited product into the amended by-law will be a consideration during consultations.~~

In By-law No. 112-2013, tobacco use is more restricted than the public places outlined in the provincial SFOA. Outside of the established buffer zones in the SFOA, individuals could be fined for use of tobacco, but not for cannabis or e-cigarettes at those same locations. **As an interim measure, harmonizing the By-law No. 112-2013 with the SFOA is important to ensure consistency and avoid confusion.** By enhancing By-law No. 112-2013, NRPH & ES is aiming to align it with the provincial legislation to ~~include cannabis and e-cigarettes.~~

Proposed Municipal Consultation

In preparation for cannabis legislation, NRPH & ES has been meeting with the municipal partners through their by-law, park/recreation and planning staff. Area Chief Administrative Officers have been notified of the proposed amendments, and meetings with each of the local area municipalities **discussed next steps and support harmonizing now, with a sunset clause, with a consensus approach moving forward. An initial meeting is** are being planned for **late January/early February.** During these meetings, NRPH & ES will learn whether the municipalities want to

~~1. Continue with the status quo~~

~~By-law 112-2013 includes only tobacco within the mandate with the SFOA restricting use of tobacco, cannabis and e-cigarettes, despite the confusion in the application and messaging between the pieces of legislation.~~

~~2. Amend By-law No. 112-2013 to align products with the SFOA~~

~~Include the substances of cannabis and e-cigarettes to apply to the same places that are currently covered by the by-law.~~

~~3. Amend By-law No. 112-2013 to align products with the SFOA and add in restrictions related to public entrances and exits~~

~~Include the substances of cannabis and e-cigarettes to apply to nine metres from all public entrances/exits.~~

~~4. Amend By-law No. 112-2013 to align products with the SFOA and expand the prohibited places of use~~

~~Include the substances of cannabis and e-cigarettes to tobacco, and add additional places (i.e. nine metres from all public entrances, beaches, trails).~~

~~Once we have this information, we propose that we return to PHSSC to provide recommended next steps. If there is support for updating the by-law we will bring the proposed amendments to Council.~~

Alternatives Reviewed

Consideration was given to **not harmonizing, and just embarking on the** a larger public consultation process. We recommend that we first assess whether there is agreement on harmonizing and updating the by-law as outlined, as it is likely that a large public consultation beyond municipal and regional meetings is not warranted for the two recommended changes. **for this simplification of the bylaw.**

Relationship to Council Strategic Priorities

This work supports Doing Business Differently by proposing that Niagara continue to aim for simplicity and consistency while remaining among the leaders in Ontario in its smoke-free policies.

Other Pertinent Reports

- PHD 01-2019 – Cannabis Legalization
- [PHD 13-2018 – Comprehensive Tobacco Control Report](#)
- [PHD 07-2018 – Cannabis Legalization](#)
- [PHD 01-2018 – Smoke-Free Ontario Modernization](#)
- [PHD 04-2017 - Ontario Student Drug Use and Health Survey Results](#)
- [PHD 09-2016 Revised - Cannabis Regulation and Control](#)

Prepared by:

Diana Teng
Manager, Chronic Disease and Injury
Prevention
Public Health and Emergency Services

Recommended by:

M. Mustafa Hirji, MD MPH RCPC
Acting Medical Officer of Health
Public Health and Emergency Services

Submitted by:

Ron Trip, P.Eng.
Acting, Chief Administrative Officer

This report was prepared in consultation with Renata Faber, Manager, Chronic Disease and Injury Prevention, David Lorenzo, Associate Director, Chronic Disease and Injury Prevention and reviewed by Dr. Feller, Associate Medical Office of Health.

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. 112-2013

A REGIONAL BY-LAW TO PROTECT CHILDREN AND VULNERABLE PERSONS
FROM EXPOSURE TO OUTDOOR SECOND-HAND SMOKE

WHEREAS subsection 115(1) of the *Municipal Act, 2001*, S.O. 2001, c.25 as amended provides that a municipality may prohibit or regulate the smoking of tobacco in public places;

AND WHEREAS it has been determined that smoking and second-hand tobacco smoke is a health hazard or discomfort for individuals residing in or visiting The Regional Municipality of Niagara (hereinafter, "Niagara Region");

AND WHEREAS smoke-free policy interventions are effective mechanisms to reduce exposure to tobacco smoke, prevent initiation of smoking, encourage cessation of smoking, support recent quitters, and contribute to the denormalization of tobacco use;

AND WHEREAS Niagara Region therefore wishes to prohibit tobacco smoking in outdoor public places for the health of the public generally, and particularly for the benefit of young persons, and to improve the environmental and social conditions in public places;

AND WHEREAS Section 115(5) of the said Act provides that a by-law passed under subsection 115(1) shall not come into force unless,

- (a) a majority of all votes on the Council of the upper-tier municipality are cast in its favour;
- (b) a majority of the Councils of all the lower-tier municipalities forming part of the upper-tier municipality for municipal purposes have passed resolutions giving their consent to the by-law; and
- (c) the total number of electors in the lower-tier municipalities that have passed resolutions under clause (b) form a majority of all the electors in the upper-tier municipality.

NOW THEREFORE BE IT RESOLVED THAT the Council of The Regional Municipality of Niagara enacts as follows:

DEFINITIONS AND INTERPRETATION

1. (1) The following definitions shall be used in interpreting and applying this by-law:

“authorized person” means an individual designated or authorized by Niagara Region or an area municipality whose duties include, without limitation, tobacco control or the monitoring of regional or municipal property for the purpose of addressing unauthorized activities;

“area municipality” means any one of the municipalities of the Town of Fort Erie, Town of Grimsby, Town of Lincoln, City of Niagara Falls, Town of Niagara-on-the-Lake, Town of Pelham, City of Port Colborne, City of St. Catharines, City of Thorold, Township of Wainfleet, City of Welland and the Township of West Lincoln.

“outdoor public place” means any property owned, leased or controlled by the Niagara Region or any area municipality, including without limitation parks, playgrounds, sports or playing fields, arenas, recreational centres, bus shelters, splash pads, pools and any area that is within a nine-metre radius of an entrance to or exit from a building located on any property owned, leased or controlled by the Niagara Region or any area municipality, whether or not a “No Smoking” sign is posted, but does not include the following:

- a. highways;
- b. road allowances abutting a regional or municipal property;
- c. municipal sidewalks, save and except for that portion of any municipal sidewalk that is within a nine-metre radius of any entrance to or exit from a building located on any property owned, leased or controlled by the Niagara Region or any area municipality;
- d. parking lots or any area designated for the parking of motor vehicles;
- e. beaches;
- f. walking or hiking trails;
- g. rights-of-way; and
- h. residential dwellings owned, operated or subsidized by Niagara Regional Housing or an area municipality;

“smoke” or **“smoking”** includes the holding of tobacco or other lighted smoking material or equipment while the product is alight or emitting smoke;

“tobacco” includes pipe tobacco, water-pipe tobacco, cigarettes, cigars, cigarillos or any similar product made with or containing tobacco;

PROHIBITION

- 2.(1) No person shall smoke tobacco upon or within an outdoor public place.
- 2.(2) The prohibition in section 2.(1) above applies whether or not a “No Smoking” sign of any format or content is posted.
- 2.(3) No person shall remove a sign posted under this section while the prohibition remains in force.
- 2.(4) No person shall hinder or obstruct an authorized person lawfully carrying out the enforcement of this by-law.

OFFENCE and SET FINE

- 3.(1) Any person who contravenes a provision of this by-law is guilty of an offence and, upon conviction, is liable to a set fine of \$250.00.

ENFORCEMENT

- 4.(1) The provisions of this by-law respecting smoking in an outdoor public place shall be enforced by any authorized person as designated by the Niagara Region or an area municipality.

CONFLICTS

- 5.(1) If a provision of this by-law conflicts with an Act or a regulation or another by-law, the provision that is the most restrictive of smoking shall prevail.

SEVERABILITY

- 6.(1) If any section or part of this by-law are found by any Court of competent jurisdiction to be invalid, such section or part shall be deemed to be severable and all other sections of this by-law shall remain valid and enforceable.

ENACTMENT

- 7.(1) This by-law shall come into force on the day that it is approved in accordance with section 115(5) of the *Municipal Act, 2001*, S.O. 2001, C.25.

EFFECTIVE BY-LAW DATE

8. This by-law shall come into force on the date specified by the Regional Clerk as the date when the following have been achieved:
- a) A majority of the Councils of all of the lower-tier municipalities forming part of The Regional Municipality of Niagara have passed resolutions giving consent to this by-law: and
 - b) The total number of electors in the lower-tier municipalities that have passed resolutions under clause (a) above form a majority of all the electors in The Regional Municipality of Niagara.

PASSED, a majority of the members of the Regional Council assenting hereto, this 10th day of October, 2013.

THE REGIONAL MUNICIPALITY OF NIAGARA

Original Signed By:

(Gary Burroughs, Regional Chair)

Original Signed By:

(Janet Pilon, Regional Clerk)

~~Bill 112~~

THE REGIONAL MUNICIPALITY OF NIAGARA

(CONSOLIDATED) BY-LAW NO. ~~112-2-13~~

A REGIONAL BY-LAW TO PROTECT CHILDREN AND VULNERABLE PERSONS
FROM EXPOSURE TO OUTDOOR SECOND-HAND SMOKE **AND VAPING**

WHEREAS subsection 115(1) of the *Municipal Act, 2001*, S.O. 2001, c.25 as amended provides that a municipality may prohibit or regulate the smoking of tobacco **or cannabis** in public places;

AND WHEREAS the *Smoke-Free Ontario Act, 2017*, S.O. 2017, c. 26 as amended prohibits smoking tobacco or cannabis and vaping (use electronic cigarette), but Regional By-Law No. 112-2013 only prohibits smoking tobacco;

AND WHEREAS it has been determined that smoking and second-hand tobacco **and cannabis** smoke is a health hazard or discomfort for individuals residing in or visiting The Regional Municipality of Niagara (hereinafter, "Niagara Region");

AND WHEREAS smoke-free policy interventions are effective mechanisms to reduce exposure to tobacco smoke, prevent initiation of smoking, encourage cessation of smoking, support recent quitters, and contribute to the denormalization of tobacco ~~uses~~ **smoking**;

AND WHEREAS Niagara Region therefore wishes to prohibit tobacco **and cannabis** smoking **and vaping (use electronic cigarette)** in outdoor public places for the health of the public generally, and particularly for the benefit of young persons, and to improve the environmental and social conditions in public places;

AND WHEREAS Section 115(5) of the said Act provides that a by-law passed under subsection 115(1) shall not come into force unless,

- (a) a majority of all votes on the Council of the upper-tier municipality are cast in its favour;
- (b) a majority of the Councils of all the lower-tier municipalities forming part of the upper-tier municipality for municipal purposes have passed resolutions giving their consent to the by-law; and
- (c) the total number of electors in the lower-tier municipalities that have passed resolutions under clause (b) form a majority of all the electors in the upper-tier municipality.

NOW THEREFORE BE IT RESOLVED THAT the Council of The Regional Municipality of Niagara enacts as follows:

Bill 112

DEFINITIONS AND INTERPRETATION

1. (1) The following definitions shall be used in interpreting and applying this by-law:

"authorized person" means an individual designated or authorized by Niagara Region or an area municipality whose duties include, without limitation, tobacco, **cannabis or electronic cigarette** control or the monitoring of regional or municipal property for the purpose of addressing unauthorized activities;

"area municipality" means any one of the municipalities of the Town of Fort Erie, Town of Grimsby, Town of Lincoln, City of Niagara Falls, Town of Niagara-on-the-Lake, Town of Pelham, City of Port Colborne, City of St. Catharines, City of Thorold, Township of Wainfleet, City of Weiland and the Township of West Lincoln.

"outdoor public place" means any property owned, leased or controlled by the Niagara Region or any area municipality, including without limitation parks, playgrounds, sports or playing fields, arenas, recreational centres, bus shelters, splash pads, pools and any area that is within a nine-metre radius of an entrance to or exit from a building located on any property owned, leased or controlled by the Niagara Region or any area municipality, whether or not a "No Smoking" or **"No Vaping"** sign is posted, but does not include the following:

- a. highways;
- b. road allowances abutting a regional or municipal property;
- c. municipal sidewalks, save and except for that portion of any municipal sidewalk that is within a nine-metre radius of any entrance to or exit from a building located on any property owned, leased or controlled by the Niagara Region or any area municipality;
- d. parking lots or any area designated for the parking of motor vehicles;
- e. beaches;
- f. walking or hiking trails;
- g. rights-of-way; and
- h. residential dwellings owned, operated or subsidized by Niagara Regional Housing or an area municipality;

"smoke" or "smoking" includes the holding of tobacco or **cannabis** or other lighted smoking material or equipment while the product is alight or emitting smoke;

"tobacco" includes pipe tobacco, water-pipe tobacco, cigarettes, cigars, cigarillos or any similar product made with or containing tobacco;

Bill 112

“cannabis” has the same meaning as in subsection 2 (1) of the *Cannabis Act* (Canada); (“cannabis”)

“electronic cigarette” has the same meaning as in subsection 1 (1) of the *Smoke-Free Ontario Act, 2017*

PROHIBITION

- 2.(1) No person shall smoke tobacco **or cannabis, or vape (use electronic cigarette)** upon or within an outdoor public place.
- 2.(2) The prohibition in section 2.(1) above applies whether or not a "No Smoking" or **“No Vaping”** sign of any format or content is posted.
- 2.(3) No person shall remove a sign posted under this section while the prohibition remains in force.
- 2.(4) No person shall hinder or obstruct an authorized person lawfully carrying out the enforcement of this by-law.

OFFENCE and SET FINE

- 3.(1) Any person who contravenes a provision of this by-law is guilty of an offence and, upon conviction, is liable to a set fine of \$250.00.

ENFORCEMENT

- 4.(1) The provisions of this by-law respecting smoking in an outdoor public place shall be enforced by any authorized person as designated by the Niagara Region or an area municipality.

CONFLICTS

- 5.(1) If a provision of this by-law conflicts with an Act or a regulation or another by-law, the provision that is the most restrictive of smoking shall prevail.

SEVERABILITY

- 6.(1) If any section or part of this by-law are found by any Court of competent jurisdiction to be invalid, such section or part shall be deemed to be severable and all other sections of this by-law shall remain valid and enforceable.

Bill 112
ENACTMENT

7.(1) This by-law shall come into force on the day that it is approved in accordance with section 115(5) of the *Municipal Act, 2001*, S.O. 2001, C.25 **as amended**.

EFFECTIVE BY-LAW DATE

8. This by-law shall come into force on the date specified by the Regional Clerk as the date when the following have been achieved:
- a) A majority of the Councils of all of the lower-tier municipalities forming part of The Regional Municipality of Niagara have passed resolutions giving consent to this by-law: and
 - b) The total number of electors in the lower-tier municipalities that have passed resolutions under clause (a) above form a majority of all the electors in The Regional Municipality of Niagara.

THE REGIONAL MUNICIPALITY OF NIAGARA

Original Signed By:

(James Bradley, Regional Chair)

Original Signed By:

(, Regional Clerk)

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. 2019-07

A BY-LAW TO AMEND BY-LAW 112-2013 BEING A BY-LAW TO PROTECT CHILDREN AND VULNERABLE PERSONS FROM EXPOSURE TO OUTDOOR SECOND-HAND SMOKE

WHEREAS subsection 115(1) of the *Municipal Act, 2001*, S.O. 2001, c.25, as amended (hereinafter the “Act”) provides that a municipality may prohibit or regulate the smoking of tobacco or cannabis in public places;

WHEREAS subsection 11(2) of the Act provides The Regional Municipality of Niagara (hereinafter, “Niagara Region”) broad authority to govern the health, safety and well-being of persons;

WHEREAS the *Smoke-Free Ontario Act, 2017*, S.O. 2017, c. 26 (hereinafter the “*Smoke-Free Ontario Act*”) as amended prohibits smoking tobacco or cannabis, and vaping (the use of electronic cigarettes), but Regional By-Law No. 112-2013 only prohibits smoking tobacco;

WHEREAS pursuant to subsection 115(10) of the Act if there is a conflict between a by-law passed by a municipality and the provisions of any other statute or regulation of Ontario, the provision that is most restrictive of smoking of tobacco or cannabis prevails;

WHEREAS it has been determined that smoking, second-hand tobacco and cannabis smoke and vaping are health hazards and a discomfort for individuals residing in or visiting Niagara Region;

WHEREAS smoke-free policy interventions are effective mechanisms to reduce exposure to tobacco smoke, prevent initiation of smoking, encourage cessation of smoking, support recent quitters, and contribute to the denormalization of smoking;

WHEREAS Niagara Region therefore wishes to prohibit tobacco and cannabis smoking and vaping (use of electronic cigarettes) in outdoor public places for the health of the public generally, and particularly for the benefit of young persons, and to improve the environmental and social conditions in public places; and,

WHEREAS Section 115(5) of the said Act provides that a by-law passed under subsection 115(1) shall not come into force unless,

- (a) a majority of all votes on the Council of the upper-tier municipality are cast in its favour;

- (b) a majority of the Councils of all the lower-tier municipalities forming part of the upper-tier municipality for municipal purposes have passed resolutions giving their consent to the by-law; and
- (c) the total number of electors in the lower-tier municipalities that have passed resolutions under clause (b) form a majority of all the electors in the upper-tier municipality.

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That the following definitions are added to subsection 1(1) of By-law 112-2013 in alphabetical order within the context of all definitions currently contained in said by-law:
 - “cannabis” has the same meaning as in subsection 1 (1) of the Smoke-Free Ontario Act, 2017”
 - “electronic cigarette” has the same meaning as in subsection 1 (1) of the Smoke-Free Ontario Act, 2017”
 - “use” with respect to electronic cigarettes includes any of the following:
 - (a) Inhaling vapour from an electronic cigarette;
 - (b) Exhaling vapour from an electronic cigarette;
 - (c) Hold an activated electronic cigarette;
 - “vape” means to use an electronic cigarette;
2. The definition of “smoke or smoking” contained in subsection 1(1) of By-law 112-2013 shall have the words “or cannabis” added following the word “tobacco” and prior to the word “or”.
3. Section 2(1) of By-law 112-2013 shall be amended by adding after the word “tobacco” and prior to the word “upon” the following words:
 - “or cannabis or vape”
4. The invalidity or unenforceability of a provision of this by-law or part of a provision of this by-law shall not negate the effectiveness or validity of the remaining provisions or parts thereof of this by-law.
5. This by-law shall come into force on the date specified by the Regional Clerk as the date when the following have been achieved:

- a) A majority of the Councils of all of the lower-tier municipalities forming part of The Regional Municipality of Niagara have passed resolutions giving consent to this by-law: and
 - b) The total number of electors in the lower-tier municipalities that have passed resolutions under clause (a) above form a majority of all the electors in The Regional Municipality of Niagara.
6. The amendments to By-law 112-2013 effected by sections one to three of this by-law shall cease to be effective one year from the date this by-law comes into force pursuant to section 5 thereof provided:
- a. On and after the date upon which sections one to three of this by-law cease to be effective, the provisions of By-law 112-2013 excepting the specific amendments described by this by-law shall remain in force as if this By-law had not been enacted;
 - b. And section 6 of this by-law shall not invalidate any proceedings regarding contraventions of section 2(1) of By-law 112-2013, as amended by this by-law, occurring during the period when the amendments remained in effect notwithstanding that the prosecution and conviction may occur after the date upon which sections one to three of this by-law cease to be effective .
7. That this by-law was passed by the Council for Niagara Region as of the 17th day of January 2019.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed: <date>



Community Services

Legislative Services

February 12, 2019
File #120203

Sent via Email: ann-marie.norio@niagararegion.ca

Ann-Marie Norio, Regional Clerk
Niagara Region
1815 Sir Issac Brock Way, P.O. Box 1042
Thorold, ON L2V 4T7

Dear Ms. Norio:

Re: Protect Children and Vulnerable Persons from Exposure to Outdoor Second-Hand Smoke – Triple Majority Requirement By-law

The Municipal Council of the Town of Fort Erie at its meeting of February 11, 2019 received and supported the motion passed by Regional Council on January 17, 2019 requesting local area municipality's consultation to build a consensus on an updated by-law:

That: The Council of The Corporation of the Town of Fort Erie consents to the passage of By-law No. 2019-07 passed by The Regional Municipality of Niagara, being a by-law to Amend By-law No. 112-2013 to Protect Children and Vulnerable Persons from Exposure to Outdoor Second-Hand Smoke.

Trusting this information will be of assistance to you.

Yours very truly,

Carol Schofield, Dipl.M.A.
Manager, Legislative Services/Clerk
cschofield@forterie.ca

CS:dlk

cc: Niagara Local Area Municipalities *Sent via email*



4800 SOUTH SERVICE RD
BEAMSVILLE, ON L0R 1B1
905-563-8205

April 17, 2019

SENT VIA EMAIL

Region of Niagara
1815 Sir Isaac Brock Way
P.O. Box 1042
Thorold, ON L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

**RE: PROTECT CHILDREN AND VULNERABLE PERSONS FROM EXPOSURE TO
OUTDOOR SECOND-HAND SMOKE – TRIPLE MAJORITY REQUIREMENT
BY-LAW**

The Council for the Corporation of the Town of Lincoln at its meeting on April 15, 2019 received and supported the motion passed by Regional Council on January 17, 2019 requesting local area municipality's consultation to build a consensus on an updated by-law:

**THAT THE COUNCIL OF THE TOWN OF LINCOLN consents to the
passage of By-law No. 2019-07 passed by The Regional
Municipality of Niagara, being a by-law to amend By-law 112-2013
to Protect Children and Vulnerable Persons from Exposure to
Outdoor Second-Hand Smoke.**

Regards,

Julie Kirkelos
Town Clerk
jkirkelos@lincoln.ca

cc: Local Area Municipal Clerks, sent via email



March 27, 2019

Niagara Region
1815 Sir Isaac Brock Way
P.O. Box 1042
Thorold, ON L2V 4T7

Ms. Ann-Marie Norio:

Sent via E-mail

Re: Niagara Region – Amended Smoking By-law

Please be advised that City Council at its meeting of March 19, 2019 passed the following motion:

Ordered on the motion of Councillor Kerrio, seconded by Councillor Ioannoni that Council pass a resolution giving their consent to the passing of the Region's amended Smoking By-law.

I trust that this information will be of assistance.

Sincerely,

Bill Matson
City Clerk



Department of Corporate Services

1593 Four Mile Creek Road

P.O. Box 100, Virgil, ON L0S 1T0

905-468-3266 • Fax: 905-468-2959

www.notl.org

February 14, 2019

SENT ELECTRONICALLY

Regional Municipality of Niagara
1815 Sir Issac Brock Way, PO Box 1042
Thorold ON L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

Dear Ms. Norio:

RE: By-law 112-2013 - Protect Children and Vulnerable Persons from Exposure to Outdoor Second-Hand Smoke

Please be advised the Council of The Corporation of the Town of Niagara-on-the-Lake, at its regular meeting held on February 11, 2019 approved the following resolution:

WHEREAS Niagara Regional Council, at its meeting of January 17, 2019, approved that By-law No. 112-2013 be updated to harmonize with the Smoke Free Ontario Act to include vaping and cannabis, as an interim measure for consistency, with an appropriate sunset clause; and that Niagara Region staff be directed to consult with the Local Area Municipalities (LAMs) and the public to build a consensus on an updated regional by-law to protect children and vulnerable persons from exposure to outdoor second-hand smoke;

AND WHEREAS Niagara Region's By-Law No. 112-2013 aims to protect children and vulnerable persons from exposure to outdoor second-hand tobacco smoke, and does not currently address the second-hand smoke exposure to cannabis or second-hand vapour exposure from electronic e-cigarettes through outdoor spaces;

And WHEREAS Pursuant to Section 115(5) of the Municipal Act, 2001, a by-law passed under subsection 115(1) shall not come into force unless: a) A majority of all votes on the Council of the upper-tier municipality are cast in its favour; b) A majority of the Councils of all the lower-tier municipalities forming part of the upper-tier municipality for municipal purposes have passed resolutions giving their consent to the by-law; and c) The total number of electors in the lower-tier municipalities that have passed resolutions under clause (b) form a majority of all the electors in the upper-tier municipality;

NOW THEREFORE be it resolved that the Council of The Corporation of the Town of Niagara-on-the-Lake hereby endorse Niagara Region By-law 2019-07 and proposed revisions to Niagara Region By-law 112-2013.

If you have any questions or require further information please contact our office at 905-468-3266.

Yours sincerely,

A handwritten signature in blue ink, appearing to read 'Peter Todd', with a stylized flourish extending to the right.

Peter Todd, Town Clerk



February 21, 2019

Niagara Region
Office of the Regional Clerk
1815 Sir Isaac Brock Way
PO Box 1042
Thorold, Ontario
L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

Dear Ms. Norio:

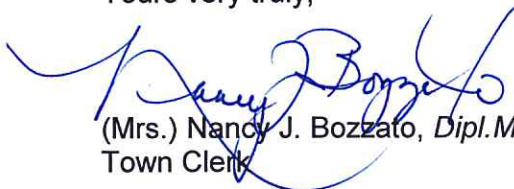
Regional By-law 2019-07 Outdoor Second-Hand Smoke

At their regular meeting of February 19th, 2019, Council of the Town of Pelham endorsed the following:

BE IT RESOLVED THAT the Council for The Corporation of the Town of Pelham hereby consents to the passage of By-law No. 2019-07, passed by The Regional Municipality of Niagara, being a by-law to Amend By-law No. 112-2013 to Protect Children and Vulnerable Persons from Exposure to Outdoor Second-Hand Smoke.

On behalf of Council, thank you for your correspondence.

Yours very truly,



(Mrs.) Nancy J. Bozzato, *Dipl.M.M., AMCT*
Town Clerk

/hw

From the Clerk's Department





March 19, 2019

Ann-Marie Norio
Regional Clerk Niagara Region
1815 Sir Isaac Brock Way, P.O. Box 1042 Thorold, ON
L2V 4T7

Sent via email to Ann-Marie.Norio@niagararegion.ca

Re: By-law 112-2013

Dear Ms. Norio,

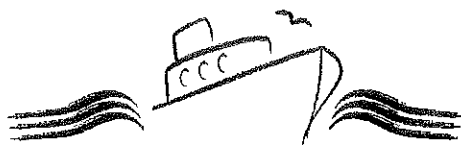
Please be advised that at its meeting held on March 18, 2019, St. Catharines City Council approved the following motion:

That the Council of the City of St. Catharines consents to amend
By-law 112-2013 being a By-law to protect children and vulnerable
persons from exposure to outdoor second-hand smoke.

If you have any questions, please contact the Office of the City Clerk at extension 1524.

A handwritten signature in blue ink, appearing to read "Bonnie Nistico-Dunk".

Bonnie Nistico-Dunk, City Clerk
Legal and Clerks Services, Office of the City Clerk
:kn



Where Ships Climb The Mountain...

February 21, 2019

Office of the Regional Clerk
Niagara Region
1815 Sir Isaac Brock Way, P.O. Box 1044
Thorold, ON L2V 4Y6

Ann-Marie.Norio@niagararegion.ca

Attention: Ann-Marie Norio, Regional Clerk

Dear Ms. Norio:

Re: Notice of Passing of By-law to Amend By-law 112-2013 Being a By-law to Protect Children and Vulnerable Persons from Exposure to Outdoor Second-Hand Smoke – Triple Majority Requirement

Please be advised Thorold City Council, at its February 5, 2019 meeting, adopted the following resolution:

That the Council of The Corporation of the City of Thorold consents to the passage of By-law No. 2019-07 passed by the Regional Municipality of Niagara, being a by-law to amend By-law No. 112-2013 to protect children and vulnerable persons from exposure to outdoor second-hand smoke, be received and supported.

CARRIED

Yours truly,

Donna Delvecchio,
City Clerk

DD:cd

ec: M. Dilwaria, Chief Administrative Officer

City of Thorold

P.O. Box 1044, 3540 Schmon Parkway, Thorold, Ontario L2V 4A7

www.thorold.com

Tel: 905-227-6613



Township of Wainfleet

"Wainfleet - find your country side!"

February 19, 2019

Office of the Regional Clerk
1815 Sir Isaac Brock Way, P.O. Box 1042
Thorold, ON L2V 4T7

SENT ELECTRONICALLY

Re: Notice of Passing of By-law to Amend By-law 112-2013 Being a By-law to Protect Children and Vulnerable Persons from Exposure to Outdoor Second-Hand Smoke – Triple Majority Requirement

Dear Ann-Marie,

Please be advised that Council for the Township of Wainfleet passed the following resolution at their Regular Meeting of Council held February 12, 2019:

"THAT the Council for the Township of Wainfleet consents to the passage of By-law No. 2019-07 of the Regional Municipality of Niagara, being a by-law to amend By-law No 112-2013 being a By-law to protect children and vulnerable persons from exposure to outdoor second-hand smoke."

If you have any questions regarding the contents of this letter, please contact the undersigned.

Regards,

Meredith Ciuffetelli
Deputy Clerk
mciuffetelli@wainfleet.ca
905-899-3463 ext. 275



City of Welland
Legislative Services
Office of the City Clerk
60 East Main Street, Welland, ON L3B 3X4
Phone: 905-735-1700 Ext. 2280 | **Fax:** 905-732-1919
Email: clerk@welland.ca | www.welland.ca

February 13, 2019

File No. 08-36

SENT VIA EMAIL

Niagara Region
1815 Sir Isaac Brock Way
P.O. Box 1042
Thorold, ON L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

Dear Ms. Ann-Marie Norio:

Re: February 5, 2019 – WELLAND CITY COUNCIL

At its meeting of February 5, 2019, Welland City Council passed the following motion:

**“THAT THE COUNCIL OF THE CITY OF WELLAND consents to amend
By-law 112-2013 being a By-law to protect children and vulnerable
persons from exposure to outdoor second-hand smoke.”**

Yours truly,

Tara Stephens
City Clerk

TS:cap

c.c.: Local Area Municipal Clerks, sent via email

CLERK'S DEPARTMENT

January 29, 2018

Ann-Marie Norio, Regional Clerk
Niagara Region
1815 Sir Isaac Brock Way
Thorold, ON
L2V 4T7

Dear Ms. Norio,

Re: Amend By-law 112-2013 – Protect Children and Vulnerable Persons from Exposure to Outdoor Second-Hand Smoke – Triple Majority Requirement – Report PHD 02-2019 (January 8, 2019)

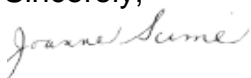
This is to confirm that on Monday, January 28, 2018, West Lincoln Township Council adopted the following resolution:

Resolution:

That, the Council of the Corporation of the Township of West Lincoln consents to Regional Municipality of Niagara amending By-law No. 112-2013, being a By-law to protect children and vulnerable persons from exposure to outdoor second-hand smoke, in order to harmonize with the Smoke Free Ontario Act to include vaping and cannabis.

If you require further information or clarification do not hesitate to contact me.

Sincerely,



Joanne Scime
Clerk

cc. Dr. M. Hirji, Medical Officer of Health
Dr. Andrea feller, Associate Medical Officer of Health

X:\cl-Clerks\Council\Council-2019\Letters\Letter to Region - re Amend By-law 112-2013 - Jan 28 Council .doc

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. 2019-07

A BY-LAW TO AMEND BY-LAW 112-2013 BEING A BY-LAW TO PROTECT CHILDREN AND VULNERABLE PERSONS FROM EXPOSURE TO OUTDOOR SECOND-HAND SMOKE

WHEREAS subsection 115(1) of the *Municipal Act, 2001*, S.O. 2001, c.25, as amended (hereinafter the “Act”) provides that a municipality may prohibit or regulate the smoking of tobacco or cannabis in public places;

WHEREAS subsection 11(2) of the Act provides The Regional Municipality of Niagara (hereinafter, “Niagara Region”) broad authority to govern the health, safety and well-being of persons;

WHEREAS the *Smoke-Free Ontario Act, 2017*, S.O. 2017, c. 26 (hereinafter the “*Smoke-Free Ontario Act*”) as amended prohibits smoking tobacco or cannabis, and vaping (the use of electronic cigarettes), but Regional By-Law No. 112-2013 only prohibits smoking tobacco;

WHEREAS pursuant to subsection 115(10) of the Act if there is a conflict between a by-law passed by a municipality and the provisions of any other statute or regulation of Ontario, the provision that is most restrictive of smoking of tobacco or cannabis prevails;

WHEREAS it has been determined that smoking, second-hand tobacco and cannabis smoke and vaping are health hazards and a discomfort for individuals residing in or visiting Niagara Region;

WHEREAS smoke-free policy interventions are effective mechanisms to reduce exposure to tobacco smoke, prevent initiation of smoking, encourage cessation of smoking, support recent quitters, and contribute to the denormalization of smoking;

WHEREAS Niagara Region therefore wishes to prohibit tobacco and cannabis smoking and vaping (use of electronic cigarettes) in outdoor public places for the health of the public generally, and particularly for the benefit of young persons, and to improve the environmental and social conditions in public places; and,

WHEREAS Section 115(5) of the said Act provides that a by-law passed under subsection 115(1) shall not come into force unless,

- (a) a majority of all votes on the Council of the upper-tier municipality are cast in its favour;

- (b) a majority of the Councils of all the lower-tier municipalities forming part of the upper-tier municipality for municipal purposes have passed resolutions giving their consent to the by-law; and
- (c) the total number of electors in the lower-tier municipalities that have passed resolutions under clause (b) form a majority of all the electors in the upper-tier municipality.

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That the following definitions are added to subsection 1(1) of By-law 112-2013 in alphabetical order within the context of all definitions currently contained in said by-law:
 - “cannabis” has the same meaning as in subsection 1 (1) of the Smoke-Free Ontario Act, 2017”
 - “electronic cigarette” has the same meaning as in subsection 1 (1) of the Smoke-Free Ontario Act, 2017”
 - “use” with respect to electronic cigarettes includes any of the following:
 - (a) Inhaling vapour from an electronic cigarette;
 - (b) Exhaling vapour from an electronic cigarette;
 - (c) Hold an activated electronic cigarette;
 - “vape” means to use an electronic cigarette;
2. The definition of “smoke or smoking” contained in subsection 1(1) of By-law 112-2013 shall have the words “or cannabis” added following the word “tobacco” and prior to the word “or”.
3. Section 2(1) of By-law 112-2013 shall be amended by adding after the word “tobacco” and prior to the word “upon” the following words:
 - “or cannabis or vape”
4. The invalidity or unenforceability of a provision of this by-law or part of a provision of this by-law shall not negate the effectiveness or validity of the remaining provisions or parts thereof of this by-law.
5. This by-law shall come into force on the date specified by the Regional Clerk as the date when the following have been achieved:

- a) A majority of the Councils of all of the lower-tier municipalities forming part of The Regional Municipality of Niagara have passed resolutions giving consent to this by-law: and
 - b) The total number of electors in the lower-tier municipalities that have passed resolutions under clause (a) above form a majority of all the electors in The Regional Municipality of Niagara.
6. The amendments to By-law 112-2013 effected by sections one to three of this by-law shall cease to be effective one year from the date this by-law comes into force pursuant to section 5 thereof provided:
- a. On and after the date upon which sections one to three of this by-law cease to be effective, the provisions of By-law 112-2013 excepting the specific amendments described by this by-law shall remain in force as if this By-law had not been enacted;
 - b. And section 6 of this by-law shall not invalidate any proceedings regarding contraventions of section 2(1) of By-law 112-2013, as amended by this by-law, occurring during the period when the amendments remained in effect notwithstanding that the prosecution and conviction may occur after the date upon which sections one to three of this by-law cease to be effective .
7. That this by-law was passed by the Council for Niagara Region as of the 17th day of January 2019.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed: <date>

MEMORANDUM

CL-C 33-2019

Subject: Provincial Review of Regional Government

Date: April 25, 2019

To: Regional Council

From: Ann-Marie Norio, Regional Clerk

On January 15, 2019, the Province announced that a review of Regional government would be undertaken.

At the Committee of the Whole meeting held on March 7, 2019, Committee considered COTW-C 02-2019 being a letter from the local area Mayors respecting undertaking a procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the local municipalities on government relations, public polling and communications in regard to the Provincial government review of Regional government.

At the Regional Council meeting on March 28, 2019, a memorandum from the Chief Administrative Officer, indicated that staff were moving forward in accordance with the direction of COTW-C 02-2019.

As part of the consultation process, the Province has set up meetings in each area to hear from delegations that registered to speak prior to April 9, 2019. The Special Advisors will be conducting the Niagara session on May 1 in our Council Chamber. The Province will report back on what they heard during the consultation process this fall.

The Province has advised that Council members affected by the review are welcome and encouraged to participate in the ongoing open consultation process and share their ideas and opinions via a written submission by May 21, 2019. The Province has noted that if a Council wishes to provide a written submission, they would also be considered.

Respectfully submitted and signed by

Ann-Marie Norio
Regional Clerk

Attachments: COTW-C 02-2019
CAO 02-2019
CWCD 146-2019
Regional Government Input



OFFICE OF THE MAYOR
4800 SOUTH SERVICE ROAD
BEAMSVILLE, ON L0R 1B1
Phone: 905-563-8205
Fax: 905-563-6566
www.lincoln.ca

March 6, 2019

Niagara Region
c/o Ron Tripp
Acting CAO

Dear Region of Niagara;
Re: Provincial Review of Regional Government

Following the recent conference call among the heads of Council of the lower tier municipalities including the Regional Municipality of Niagara it was agreed that the 12 Mayors and Chair, whom have signed below, request that the Region, on behalf of the 13 Municipalities undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government.

Further, this item be included in the Committee of the Whole Agenda for [Thursday, March 7, 2019](#) at 6:30pm at Regional Headquarters.

The CAO's will coordinate this effort. They will advise on appropriate companies to be considered. The CAO's will also act in the capacity of selecting said company and preparing sample questions in advance to be used for the public polling.

In their capacity as signing officers, the CAO's in their guidance to the Heads of Council will liaise with the successful bidder throughout the procurement process to ensure a successful conclusion.

Heads of Council will ensure that their own Councils and Regional Council members are kept apprised of the process.



OFFICE OF THE MAYOR
4800 SOUTH SERVICE ROAD
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Fax: 905-563-6566
www.lincoln.ca

We are the Mayors and Regional Chair of the Region of Niagara and are in support of this request.

Mayor Wayne Redekop

Fort Erie

Mayor Jim Diodati

Niagara Falls

Mayor Bill Steele

Port Colborne

Mayor Jeff Jordan

Grimsby

Lord Mayor Betty Disero

Niagara-on-the-Lake

Mayor Walter Sendzik

St. Catharines

Mayor Sandra Easton

Lincoln

Mayor Marvin Junkin

Pelham

Mayor Terry Ugolini

Thorold

Mayor Kevin Gibson

Wainfleet

Mayor Frank Campion

Welland

Mayor David Bysma

West Lincoln

Chair Jim Bradley

Niagara Region

MEMORANDUM

CAO 2-2019

Subject: Provincial Review of Regional Government

Date: March 28, 2019

To: Regional Council

From: Ron Tripp, Acting Chief Administrative Officer

This is to provide a follow up to Correspondence COTW-C 02-2019 and to make Regional Council aware that ten of the local area municipalities (LAM) have since passed resolutions in support of the actions proposed in that document. Two of the LAMs have received the document for information. The respective resolutions of municipal Councils have been attached as Appendix A to the memorandum.

Staff has also canvassed Regional peer organizations in order to understand their disposition in this matter and to provide further background and context. The following is a summary of the responses received to date:

- Halton Region - adopted a resolution March 27, 2019 that the province not undertake any action (content to be confirmed)
- Region of Waterloo – notice of motion for March 27, 2019, desire to hold a public meeting to allow citizens to speak to the matter
- York Region – intention to present a report to Council April 18, 2019 with recommendation for Chair to send a letter to the province (content to be confirmed)
- Region of Peel - no plans to bring this matter to Regional Council, each of their local municipalities will be taking reports to their respective Councils

The Provincial Review was discussed at the Niagara CAO's meeting of March 8, 2019, the day following Regional Council's COTW meeting. In anticipation of support from each of the respective local municipal Councils, a sub-committee of CAOs was established at that meeting. The planning and execution of the actions articulated in COTW-C 02-2019 was established as the mandate for this group.

Subject to any further comments and/or direction from Regional Council, Staff will proceed in accordance with the direction of COTW-C 02-2019. Staff can confirm that the funding for this work can be accommodated in the 2019 Operating Budget.

Respectfully submitted and signed by

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

Appendix A: Summary of Local Area Municipal Resolutions

c.c.: Local Area Municipal Chief Administrative Officers

Response Summary
Provincial Review of Regional Government
Minute Item 6.2, COTW 1-2019, March 7, 2019
[COTW-C 02-2019](#)
[CLK-C 2019-072](#)

Municipality	Dated	Response
<u>Fort Erie</u>	2019-03-19	Receive for information
<u>Grimsby</u>	2019-03-27	Support
<u>Lincoln</u>	2019-03-19	Support
<u>Niagara Falls</u>	2019-03-27	Receive for information
<u>Niagara-on-the-Lake</u>	2019-03-13	Support
<u>Pelham</u>	2019-03-25	Support
<u>Port Colborne</u>	2019-03-26	Support
<u>St. Catharines</u>	2019-03-19	Support
<u>Thorold</u>	2019-03-21	Support
<u>Wainfleet</u>	2019-03-27	Support
<u>Welland</u>	2019-03-25	Support
<u>West Lincoln</u>	2019-03-26	Support

Last updated: Thursday, March 28, 2019



Community Services

Legislative Services

March 19, 2019

File #120203

Sent via Email: ann-marie.norio@niagararegion.ca

Ann-Marie Norio, Regional Clerk
Niagara Region
1815 Sir Issac Brock Way, P.O. Box 1042
Thorold, ON L2V 4T7

Dear Ms. Norio:

Re: Niagara Region – Provincial Review of Regional Government

Please be advised the Municipal Council of the Town of Fort Erie at its meeting of March 18, 2019 received your correspondence dated March 8, 2019 and supported the letter from the Local Area Municipal Mayors dated March 6, 2019 respecting Provincial Review of Regional Government.

Trusting this information will be of assistance to you.

Yours very truly,

Carol Schofield, Dipl.M.A.
Manager, Legislative Services/Clerk
cschofield@forterie.ca

CS:dlk

c.c. Niagara Local Area Municipalities *Sent via email*

TOWN OF GRIMSBY



TELEPHONE: (905) 945-9634
FAX: (905) 945-5010
www.town.grimsby.on.ca

160 LIVINGSTON AVENUE
P.O. BOX 159
GRIMSBY, ONTARIO
L3M 4G3

PLEASE REFER TO FILE NO.

March 27, 2019

SENT VIA EMAIL

Region of Niagara
1815 Sir Isaac Brock Way
P.O. Box 1042
Thorold, ON L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

RE: REGIONAL COUNCIL REQUEST – PROVINCIAL REVIEW OF REGIONAL GOVERNMENT

Please be advised that Town of Grimsby Council passed the following motion on March 18, 2019:

THAT the correspondence from the Regional Clerk dated March 8, 2019 (see attached Appendix A) regarding Provincial Review of Regional Government be received for information; and

THAT Council endorse the request from Regional Council (see attached Appendix A)

"THAT the Region undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 local area municipalities on government relations, public polling and communications in regard to the Provincial Government Review of Regional Government", and

THAT the Acting Clerk for the Town of Grimsby be directed by Council to circulate a copy of this resolution to the Local Area Municipalities and the Regional Clerk.

Sincerely,

A handwritten signature in blue ink that reads 'Sarah Kim'.

Sarah Kim
Acting Town Clerk

cc.: Local Area Municipal Clerks (Sent via Email)
M. Cain, Fire Chief

REPORT TO: Mayor J. Jordan
Members of Council

SUBJECT: Regional Council Request – Provincial Review of Regional Government

Recommendation

"RESOLVED That Report TM(A) 19-04 dated March 15, 2019 be received and that the recommendations of this report be approved for implementation as follows:

- The correspondence from the Regional Clerk dated March 8, 2019 (see attached Appendix A) regarding Provincial Review of Regional Government be received for information; and specifically,
- That Council endorse the request from Regional Council (see attached Appendix A),
 - "THAT the Region undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 local area municipalities on government relations, public polling and communications in regard to the Provincial Government Review of Regional Government", and
- That the Acting Clerk for the Town of Grimsby be directed by Council to circulate a copy of this resolution to the Local Area Municipalities and the Regional Clerk."

Purpose

The purpose of this report is to provide Council with the correspondence issued by Regional Council regarding the Provincial Regional Government Review and affirm Council's support of the Regional resolution contained in COTW 1 – 2019 (see attached Appendix A).

Background

The Province has undertaken a Regional Government Review. The review will consider issues of governance, decision-making and service delivery in eight Regional Municipalities (Durham, Halton, Muskoka District, Niagara, Oxford County, Peel, Waterloo and York), Simcoe County and their respective lower tier municipalities. In total, there are 82 upper and lower tier that are party to this review. Additional information about the review may be obtained from the Ontario website: <https://www.ontario.ca/page/regional-government-review#section-2>. The website also outlines the appointment of Special Advisors and their Terms of Reference, as well as, a provincial contact email address to forward questions or seek additional information. It is understood that Grimsby has already been afforded time with the Special Advisors.

On February 4, 2019, the Niagara Regional Mayors including the Regional Chair issued a formal Statement:

"Niagara's Mayors are united in support for improving governance, transparency and accountability in local government. It has been nearly 50 years since Niagara Region was formed and our communities, economy and the populations we serve have changed significantly in that time. With change comes opportunity, and we agree with the provincial government that there is room for improvement in the way Niagara works."

We share the same goals in this review: to make it easier to access services, create more efficient local government, reduce duplication and be open for business. We also agree that there are a number of ways to achieve these goals and we expect that local voices and local solutions will truly be considered.

We are already working together as Team Niagara to be open for business and attract investment, jobs, and economic development. Many local agencies and municipal services are already working together to find efficiencies and reduce duplication. We are working together to build an integrated transit system that works for all of Niagara. And we know we can do more. As Mayors, we will work together to ensure that Niagara is given an opportunity to present made-in-Niagara solutions through this regional governance review."

On March 6, 2019, further correspondence, signed by all 12 Mayors and the Regional Chair, was issued to Regional Council (forming part of Appendix A to this report). The correspondence requested the Region undertake the procurement of and facilitation for finances to hire a Government Relations / Communications firm to advise the 13 municipalities on matters relevant to the ongoing Provincial Regional Government Review. At the March 7, 2019 Committee of the Whole, the following motion, as approved by Regional Council, was forwarded to the Clerk on or about March 8, 2019:

"That Correspondence Item COTW-C 02-2019, being a letter from the Local Area Municipal Mayors, dated March 6, 2019, respecting Provincial Review of Regional Government, BE RECEIVED and BE CIRCULATED to the Local Area Municipalities for consideration by their respective Councils at their next meeting for comment back to Niagara Region by March 28, 2019."

The March 6, 2019 correspondence further identified the Mayors & Regional Chair direction that the CAO's will serve to coordinate the process of procurement, selection and liaison with the bidders and successful company throughout the process, on behalf of the respective Heads of Council. At the March 8, 2019 meeting of CAO's, a subcommittee was created for this purpose.

Financial Implications

There are no financial implications to the Town, as the Region will address the financial obligations of this project.

Conclusion

The recommendation contained in this report are intended to establish Council's support of the 12 Mayors and Regional Chair, specifically for Region to undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 local area municipalities on government relations, public polling and communications in regard to the Provincial Government Review of Regional Government.

Respectfully submitted,



Michael Chin
Fire Chief
MC/ew

APPENDIX A



Administration

Office of the Regional Clerk

1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2Y 4T7

Telephone: 905-685-4225 Toll-free: 1-800-263-7215 Fax: 905-687-4977

www.niagararegion.ca

March 8, 2019

COTW 1-2019, March 7, 2019

LOCAL AREA MUNICIPALITIES

SENT ELECTRONICALLY

**RE: Provincial Review of Regional Government
COTW 1-2019 Minute Item 6.2**

Committee of the Whole at its meeting held on Thursday, March 7, 2019, passed the following resolution:

That Correspondence Item COTW-C 02-2019, being a letter from the Local Area Municipal Mayors, dated March 6, 2019, respecting Provincial Review of Regional Government, **BE RECEIVED** and **BE CIRCULATED** to the Local Area Municipalities for consideration by their respective Councils at their next meeting for comment back to Niagara Region by March 28, 2019.

A copy of Correspondence Item COTW-C 02-2019 is attached for your reference.

Yours truly,

A handwritten signature in cursive script, appearing to read "Ann-Marie".

Ann-Marie Norio
Regional Clerk

CLK-C 2019-072



COTW-C 02-2019

OFFICE OF THE MAYOR
4800 SOUTH SERVICE ROAD
BEAMSVILLE, ON L0R 1B1
Phone: 905-563-8205
Fax: 905-563-6566
www.lincoln.ca

March 6, 2019

Niagara Region
c/o Ron Tripp
Acting CAO

Dear Region of Niagara;
Re: Provincial Review of Regional Government

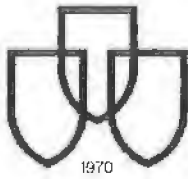
Following the recent conference call among the heads of Council of the lower tier municipalities including the Regional Municipality of Niagara it was agreed that the 12 Mayors and Chair, whom have signed below, request that the Region, on behalf of the 13 Municipalities undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government.

Further, this item be included in the Committee of the Whole Agenda for Thursday, March 7, 2019 at 6:30pm at Regional Headquarters.

The CAO's will coordinate this effort. They will advise on appropriate companies to be considered. The CAO's will also act in the capacity of selecting said company and preparing sample questions in advance to be used for the public polling.

In their capacity as signing officers, the CAO's in their guidance to the Heads of Council will liaise with the successful bidder throughout the procurement process to ensure a successful conclusion.

Heads of Council will ensure that their own Councils and Regional Council members are kept apprised of the process.



COTW-C 02-2019

OFFICE OF THE MAYOR
4800 SOUTH SERVICE ROAD
BEAMSVILLE, ON L0R 1B1
Phone: 905-563-8205
Fax: 905-563-6566
www.lincoln.ca

We are the Mayors and Regional Chair of the Region of Niagara and are in support of this request.

Mayor Wayne Redekop

Fort Erie

Mayor Jim Diodati

Niagara Falls

Mayor Jeff Jordan

Grimsby

Lord Mayor Betty Disero

Niagara-on-the-Lake

Mayor Sandra Easton

Lincoln

Mayor Marvin Junkin

Pelham

Mayor Terry Ugolini

Thorold

Mayor Bill Steele

Port Colborne

Mayor Walter Sendzik

St. Catharines

Mayor Kevin Gibson

Wainfleet

Mayor Frank Campion

Welland

Mayor David Bylsma

West Lincoln

Chair Jim Bradley

Niagara Region



4800 SOUTH SERVICE RD
BEAMSVILLE, ON L0R 1B1

905-563-8205

March 19, 2019

SENT VIA EMAIL

Region of Niagara
1815 Sir Isaac Brock Way
P.O. Box 1042
Thorold, ON L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

**RE: REQUEST FROM REGIONAL COUNCIL – PROVINCIAL REVIEW OF
REGIONAL GOVERNMENT**

Please be advised that Council for the Corporation of the Town of Lincoln passed the following motion on March 18, 2019:

THAT correspondence attached as Appendix A, dated March 8, 2019, from the Regional Clerk regarding Provincial Review of Regional Government be received for information; and

THAT Council of the Town of Lincoln endorse the request from Regional Council:

“THAT the Region undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 local area municipalities on government relations, public polling and communications in regard to the Provincial Government Review of Regional Government”; and

THAT Council of the Town of Lincoln support the CAO to participate on the subcommittee to assist in coordinating efforts for the Town; and

Council direct the Clerk to circulate a copy of this resolution to the Local Area Municipalities and Regional Clerk.

Carried

Regards,



Julie Kirkelos
Town Clerk
jkirkelos@lincoln.ca

cc: Local Area Municipal Clerks



March 27, 2019

Niagara Region
1815 Sir Isaac Brock Way
P.O. Box 1042
Thorold, ON L2V 4T7

Ms. Ann-Marie Norio:

Sent via E-mail

Re: Niagara Region – Provincial Review of Regional Government

Please be advised that City Council at its meeting of March 19, 2019 **received your correspondence** dated March 8, 2019, including the letter from the Local Area Municipal Mayors dated March 6, 2019 respecting Provincial Review of Regional Government, **for information”**

If you have any questions, please contact me directly.

Sincerely,

Bill Matson
City Clerk

March 13, 2019

SENT ELECTRONICALLY

Regional Municipality of Niagara
1815 Sir Issac Brock Way, PO Box 1042
Thorold ON L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

Dear Ms. Norio:

RE: Report CAO-19-001 - Provincial Review of Regional Government

Please be advised the Council of The Corporation of the Town of Niagara-on-the-Lake, at its regular meeting held on March 11, 2019 approved Report CAO-19-001, attached, which included the following recommendations:

- 1.1 That the correspondence attached to this report, from the Regional Clerk dated March 8, 2019 regarding Provincial Review of Regional Government, be received;
- 1.2 That the Council of the Town of Niagara-on-the-Lake support the request from Regional Council "that the Region undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government".

If you have any questions or require further information please contact our office at 905-468-3266.

Yours sincerely,



Peter Todd, Town Clerk



The Town of Niagara-On-The-Lake

Telephone (905) 468-3266
Facsimile (905) 468-2959

1593 Four Mile Creek Road
P.O. Box 100
Virgil, Ontario
L0S 1T0

Report: CAO-19-001

Committee Date:

Due in Council:

March 11, 2019

Report To: Lord Mayor and Council

Subject: Request from Regional Council
Provincial Review of Regional Government

1. RECOMMENDATION

It is respectfully recommended:

- 1.1 That the correspondence attached to this report, from the Regional Clerk dated March 8, 2019 regarding Provincial Review of Regional Government, be received;
- 1.2 That the Council of the Town of Niagara-on-the-Lake support the request from Regional Council "that the Region undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government".

2. PURPOSE / PROPOSAL

The purpose of this report is to provide Council with correspondence from Regional Council regarding the Provincial Review of Regional Government.

3. BACKGROUND

The Mayors of the Region and the Regional Chair prepared a Statement from Niagara Mayors dated February 4, 2019 (attached) which stated:

"Niagara's Mayors are united in support for improving governance, transparency and accountability in local government. It has been nearly 50 years since Niagara Region was formed and our communities, economy and the populations we serve have changed significantly in that time. With change comes opportunity, and we agree with the provincial government that there is room for improvement in the way Niagara works.

We share the same goals in this review: to make it easier to access services, create more efficient local government, reduce duplication and be open for business. We also agree that there are a number of ways to achieve these goals and we expect that local voices and local solutions will truly be considered.

We are already working together as Team Niagara to be open for business and attract

investment, jobs, and economic development. Many local agencies and municipal services are already working together to find efficiencies and reduce duplication. We are working together to build an integrated transit system that works for all of Niagara. And we know we can do more. As Mayors, we will work together to ensure that Niagara is given an opportunity to present made-in-Niagara solutions through this regional governance review."

The Mayors held a conference call recently and a letter was signed by all of them (part of Regional correspondence), on Mayor Easton's letterhead who took the lead on preparing the letter which was publicly dealt with at Regional Council on March 7, 2019.

4. DISCUSSION / ANALYSIS

The following motion as approved by Regional Council was forwarded to the Clerk on March 8th, 2019 as follows:

"That Correspondence Item COTW-C 02-2019, being a letter from the Local Area Municipal Mayors, dated March 6, 2019, respecting Provincial Review of Regional Government, **BE RECEIVED** and **BE CIRCULATED** to the Local Area Municipalities for consideration by their respective Councils at their next meeting for comment back to Niagara Region by March 28, 2019."

Attached to the letter from the Regional Clerk is a letter signed by all Mayors and Regional Chair. The letter outlines there was a recent conference call among the heads of Council of the lower tier municipalities including the Regional Chair whereby it was agreed that they "request the Region, on behalf of the municipalities undertake the procurement the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government."

As noted Regional Council passed a motion to receive this correspondence and that it be circulated to the Local Area Municipalities for consideration by their respective Councils by March 28, 2019.

Council's next meeting is April 11th, therefore necessitating a report be prepared for this evening's Council meeting, March 11th.

An area CAOs meeting was held on March 8th, whereby one of the items of discussion was the Regional Council motion and correspondence regarding the Provincial Government Review. All CAOs will be putting forward a report before March 28th and notify the Regional Clerk of their Council's decision.

At the area CAOs meeting a subcommittee of the CAOs was created to carry out the duties of hiring a Government Relations/Communications firm as outlined in the correspondence as follows:

"The CAOs will coordinate this effort. They will advise on appropriate companies to be considered. The CAOs will also act in the capacity of selecting said company and

preparing sample questions in advance to be used for the public polling. In their capacity as signing officers, the CAOs in their guidance to the Heads of Council will liaise with the successful bidder throughout the procurement process to ensure a successful conclusion."

For Council's information, the CAO of Niagara-on-the-Lake will be sitting on the subcommittee of CAOs to coordinate these efforts as identified in the correspondence.

5. STRATEGIC PLAN

N/A

6. OPTIONS

7. FINANCIAL IMPLICATIONS

At this time it does not appear to have any financial implications to the Town as the Region is being tasked with the financial implication of this project.

8. COMMUNICATIONS

Following the meeting, the Clerk will advise the Regional Clerk, by way of letter, of Council's decision.

9. CONCLUSION

That Council support the 12 Mayors and Regional Chair to be part of the Region undertaking the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government.

Respectfully submitted,



Holly Dowd
Chief Administrative Officer

ATTACHMENTS



CLK-C 2019-072 Provincial Review of Regional Government.pdf Statement from Niagara's Mayors.pdf



WEB ATTACHMENTS

ATTACHMENTS FOR LINK

First Capital of Upper Canada - 1792

Administration

Office of the Regional Clerk

1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

Telephone: 905-685-4225 Toll-free: 1-800-263-7215 Fax: 905-687-4977

www.niagararegion.ca

March 8, 2019

COTW 1-2019, March 7, 2019**LOCAL AREA MUNICIPALITIES****SENT ELECTRONICALLY****RE: Provincial Review of Regional Government
COTW 1-2019 Minute Item 6.2**

Committee of the Whole at its meeting held on Thursday, March 7, 2019, passed the following resolution:

That Correspondence Item COTW-C 02-2019, being a letter from the Local Area Municipal Mayors, dated March 6, 2019, respecting Provincial Review of Regional Government, **BE RECEIVED** and **BE CIRCULATED** to the Local Area Municipalities for consideration by their respective Councils at their next meeting for comment back to Niagara Region by March 28, 2019.

A copy of Correspondence Item COTW-C 02-2019 is attached for your reference.

Yours truly,

A handwritten signature in black ink, appearing to read "Ann Marie".

Ann-Marie Norio
Regional Clerk

CLK-C 2019-072



OFFICE OF THE MAYOR
4800 SOUTH SERVICE ROAD
BEAMSVILLE, ON L0R 1B1
Phone: 905-563-8205
Fax: 905-563-6566
www.lincoln.ca

March 6, 2019

Niagara Region
c/o Ron Tripp
Acting CAO

Dear Region of Niagara;
Re: Provincial Review of Regional Government

Following the recent conference call among the heads of Council of the lower tier municipalities including the Regional Municipality of Niagara it was agreed that the 12 Mayors and Chair, whom have signed below, request that the Region, on behalf of the 13 Municipalities undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government.

Further, this item be included in the Committee of the Whole Agenda for [Thursday, March 7, 2019](#) at 6:30pm at Regional Headquarters.

The CAO's will coordinate this effort. They will advise on appropriate companies to be considered. The CAO's will also act in the capacity of selecting said company and preparing sample questions in advance to be used for the public polling.

In their capacity as signing officers, the CAO's in their guidance to the Heads of Council will liaise with the successful bidder throughout the procurement process to ensure a successful conclusion.

Heads of Council will ensure that their own Councils and Regional Council members are kept apprised of the process.



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We are the Mayors and Regional Chair of the Region of Niagara and are in support of this request.

Mayor Wayne Redekop

Fort Erie

Mayor Jim Diodati

Niagara Falls

Mayor Bill Steele

Port Colborne

Mayor Jeff Jordan

Grimsby

Lord Mayor Betty Disero

Niagara-on-the-Lake

Mayor Walter Sendzik

St. Catharines

Mayor Sandra Easton

Lincoln

Mayor Marvin Junkin

Pelham

Mayor Terry Ugolini

Thorold

Mayor Kevin Gibson

Wainfleet

Mayor Frank Campion

Welland

Mayor David Bylsma

West Lincoln

Chair Jim Bradley

Niagara Region

Statement from Niagara Mayors

February 4, 2019

Niagara's Mayors are united in support for improving governance, transparency and accountability in local government. It has been nearly 50 years since Niagara Region was formed and our communities, economy and the populations we serve have changed significantly in that time. With change comes opportunity, and we agree with the provincial government that there is room for improvement in the way Niagara works.

We share the same goals in this review: to make it easier to access services, create more efficient local government, reduce duplication and be open for business. We also agree that there are a number of ways to achieve these goals and we expect that local voices and local solutions will truly be considered.

We are already working together as Team Niagara to be open for business and attract investment, jobs, and economic development. Many local agencies and municipal services are already working together to find efficiencies and reduce duplication. We are working together to build an integrated transit system that works for all of Niagara. And we know we can do more. As Mayors, we will work together to ensure that Niagara is given an opportunity to present made-in-Niagara solutions through this regional governance review.

Niagara's Mayors,

Dave Bylsma, Mayor of West Lincoln

Jeff Jordan, Mayor of Grimsby

Frank Campion, Mayor of Welland

Marvin Junkin, Mayor of Pelham

Jim Diodati, Mayor of Niagara Falls

Wayne Redekop, Mayor of Fort Erie

Betty Disero, Lord Mayor of Niagara-on-the-Lake

Walter Sendzik, Mayor of St. Catharines

Sandra Easton, Mayor of Lincoln

Bill Steele, Mayor of Port Colborne

Kevin Gibson, Mayor of Wainfleet

Terry Ugolini, Mayor of Thorold

March 25, 2019

Niagara Region
Office of the Regional Clerk
1815 Sir Isaac Brock Way
PO Box 1042
Thorold, Ontario
L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

Dear Ms. Norio:

Provincial Review of Regional Government

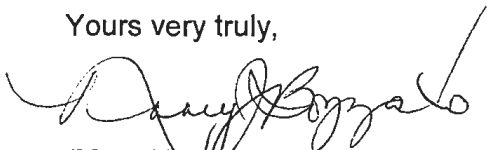
At their regular meeting of March 18th, 2019, Council of the Town of Pelham received your correspondence and endorsed the following:

BE IT RESOLVED THAT Council receive Regional Report COTW 1-2019, Minute Item 6.2 - Provincial Review of Regional Government; and

THAT Council endorse and support the letter from the Local Area Municipal Mayors requesting that the Region undertake a procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 Niagara Municipalities on government relations, public polling and communications with regard to the provincial government review of regional government.

On behalf of Council, thank you for your correspondence.

Yours very truly,



(Mrs.) Nancy J. Bozzato, Dipl.M.M., AMCT
Town Clerk

/hw

cc: Local Area Clerks



CITY OF PORT COLBORNE

Municipal Offices
66 Charlotte Street
Port Colborne, Ontario
L3K 3C8
www.portcolborne.ca

CORPORATE SERVICES DEPARTMENT, CLERK'S DIVISION

March 26, 2019

Ann-Marie Norio, Regional Clerk
Regional Municipality of Niagara
1815 Sir Isaac Brock Way
Thorold, ON, L2V 4T7

Dear Ann-Marie Norio,

Re: Region of Niagara Re: Provincial Review of Regional Government

Please be advised that, at its meeting of March 25, 2019, the Council of The Corporation of the City of Port Colborne resolved as follows:

That the letter received from the Region of Niagara regarding a letter from the Local Area Municipal Mayors, dated March 6, 2019 respecting Provincial Review of Regional Government, for consideration by respective Councils, be supported.

For more information, please contact Amber LaPointe at 905-835-2901 ext. 106 or cityclerk@portcolborne.ca.

Sincerely,

Amber LaPointe
City Clerk

ec: Local Area Municipalities



March 19, 2019

Ann-Marie Norio
Regional Clerk Niagara Region
1815 Sir Isaac Brock Way, P.O. Box 1042 Thorold, ON
L2V 4T7
Sent via email to Ann-Marie.Norio@niagararegion.ca

Re: Communications Market Research Polling Firm Procurement

Dear Ms. Norio,

Please be advised that at its meeting held on March 18, 2019, St. Catharines City Council approved the following motion:

That the City of St. Catharines City Council endorses the request from the Region of Niagara Mayors, regarding their request to undertake the procurement of a Communications Market Research Polling firm to poll the area municipalities at no cost to the City; and

That the area CAOs coordinate sample questions for the public polling; and

That the CAO work with corporate communications to share the public polling information with residents and taxpayers and report back to Council on the outcomes of the consultation and polling and next steps in the provincial governance review; and

That that the poll involve questions particular to the City of St. Catharines; and

Further, that staff consult with the Task Force regarding questions to be asked; and

That Council recommend the Region of Niagara select a consulting firm that is not associated with any political party.

If you have any questions, please contact the Office of the City Clerk at extension 1524.

A handwritten signature in black ink, appearing to read "Bonnie Nistico-Dunk".

Bonnie Nistico-Dunk, City Clerk
Legal and Clerks Services, Office of the City Clerk
:kn



March 21, 2019

Office of the Regional Clerk
Niagara Region
1815 Sir Isaac Brock Way, P.O. Box 1044
Thorold, ON L2V 4Y6

Ann-Marie.Norio@niagararegion.ca

Attention: Ann-Marie Norio, Regional Clerk

Dear Ms. Norio:

Re: Provincial Review of Regional Governance

Please be advised Thorold City Council, at its March 19, 2019 meeting, adopted the following recommendations of Chief Administrative Officer's Report CAO2019-03:

1. That Thorold City Council support the letter received from the Niagara Region's Committee of the Whole meeting held on Thursday, March 7, 2019 about a joint letter from Local Area Municipal Mayors, dated March 6, 2019 respecting Provincial Review of Regional Government.
2. That the Chief Administrative Officer be directed to forward Council's decision on this matter to the Niagara Region before March 28, 2019.

Yours truly,

Donna Delvecchio,
City Clerk

DD:cd

ec: M. Dilwaria, Chief Administrative Officer



Township of Wainfleet

"Wainfleet - find your country side!"

March 27, 2019

Niagara Region
1815 Sir Isaac Brock Way
P.O. Box 1042
Thorold, ON L2V 4T7

Sent Electronically

Attention: Ann-Marie Norio, Clerk

Dear Ms. Norio,

**RE: Provincial Government Review of Regional Government
COTW 1-2019 Minute Item 6.2**

Please be advised that, at its meeting of March 26, 2019, the Council of the Corporation of the Township of Wainfleet enacted the following resolution regarding Administration Staff Report ASR-011/2019 (copy attached) relating to the Request from Niagara Regional Council re: Provincial Review of Regional Government:

THAT this report be received; and

THAT the correspondence dated March 8, 2019, attached as Appendix "A", from Niagara Region regarding Provincial Review of Regional Government be received; and

THAT the Council of the Township of Wainfleet endorse the request from Regional Council:

***"THAT** the Region undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 local area municipalities on government relations, public polling and communications in regard to the Provincial Government Review of Regional Government"; and*

THAT the Council of the Township of Wainfleet direct the CAO to coordinate efforts for the Township in this endeavour; and

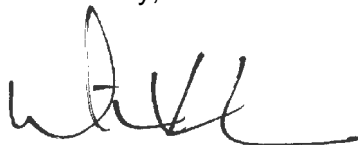
THAT a copy of this resolution be forwarded to the Local Area Municipalities and Niagara Region.

In supporting the resolution, Wainfleet Council also requested that the following comments and concerns be shared with Regional Council and with the Councils of the Local Area Municipalities:

- the need to be wary of any potential duplication of expertise or capacity that may arise between the proposed Government Relations/Communications firm and expertise/capacity that may otherwise already be available within the workforce(s) of the Region and/or Local Area Municipalities;
- the need for appropriate cost containment, as even though Niagara Region has been identified as the funding source of the exercise: there is really only a single property taxpayer within the Region; and
- the need to ensure that Niagara Region and Local Area Municipalities receive true value for the services to be rendered.

The Council of the Corporation of the Township of Wainfleet respectfully requests your consideration of the above.

Yours Truly,

A handwritten signature in black ink, appearing to read 'W. Kolasa', with a stylized flourish at the end.

William J. Kolasa
Chief Administrative Officer

ADMINISTRATION STAFF REPORT

ASR-011/2019

TO: Mayor Gibson & Members of Council

FROM: W. Kolasa, Chief Administrative Officer/Clerk

DATE OF MEETING: March 26, 2019

SUBJECT: Request from Niagara Regional Council re: Provincial Review of Regional Government

RECOMMENDATION(S):

THAT this report be received; and

THAT the correspondence dated March 8, 2019, attached as Appendix "A", from Niagara Region regarding Provincial Review of Regional Government be received; and

THAT the Council of the Township of Wainfleet endorse the request from Regional Council:

***"THAT** the Region undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 local area municipalities on government relations, public polling and communications in regard to the Provincial Government Review of Regional Government"; and*

THAT the Council of the Township of Wainfleet direct the CAO to coordinate efforts for the Township in this endeavour; and

THAT a copy of this resolution be forwarded to the Local Area Municipalities and Niagara Region.

EXECUTIVE SUMMARY:

The purpose of this report is to provide Council with details of a resolution from Niagara Region's Committee of the Whole regarding the ongoing Provincial Review of Regional Government.

BACKGROUND:

On February 4, 2019, the Mayors of the local area municipalities of Niagara Region and the Regional Chair issued a Statement (attached) that announced:

"Niagara's Mayors are united in support for improving governance, transparency and accountability in local government. It has been nearly 50 years since Niagara Region was formed and our communities, economy and the populations we serve have changed significantly in that time. With change comes opportunity, and we agree with the provincial government that there is room for improvement in the way Niagara works.

We share the same goals in this review: to make it easier to access services, create more efficient local government, reduce duplication and be open for business. We also agree that there are a number of ways to achieve these goals and we expect that local voices and local solutions will truly be considered.

We are already working together as Team Niagara to be open for business and attract investment, jobs, and economic development. Many local agencies and municipal services are already working together to find efficiencies and reduce duplication. We are working together to build an integrated transit system that works for all of Niagara. And we know we can do more. As Mayors, we will work together to ensure that Niagara is given an opportunity to present made-in-Niagara solutions through this regional governance review."

Recently, the Mayors held a conference call and a letter was issued, signed by all of them (forming part of Regional correspondence), on Mayor Easton's letterhead who took the lead on preparing the letter which was publicly dealt with at Regional Council on March 7, 2019.

OPTIONS/DISCUSSION:

The following motion as approved by Regional Council was forwarded to the Clerk on March 8th, 2019:

"That Correspondence Item COTW-C 02-2019, being a letter from the Local Area Municipal Mayors, dated March 6, 2019, respecting Provincial Review of Regional Government, **BE RECEIVED** and **BE CIRCULATED** to the Local Area Municipalities for consideration by their respective Councils at their next meeting for comment back to Niagara Region by March 28, 2019."

Attached to the correspondence from Niagara Region is a letter signed by all Mayors and Regional Chair. The letter outlines that there was a recent conference call among the heads of Council of the lower tier municipalities, including the Regional Chair, whereby it was agreed that they "request the Region, on behalf of the municipalities, to undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government."

As noted, Regional Council passed a motion to receive this correspondence and that it be circulated to the Local Area Municipalities for consideration by their respective Councils by March 28, 2019.

At a meeting of regional chief administrative officers held on March 8th, the Regional Council motion and correspondence regarding the Provincial Government Review was considered and all CAOs concluded to present a report to their respective Councils, before March 28th, and notify the Regional Clerk of each Council's decision. Further, a subcommittee of the CAOs was created to implement the provided direction and carry out the duties of hiring a Government Relations/Communications firm as outlined in the Mayor's correspondence as follows:

"The CAOs will coordinate this effort. They will advise on appropriate companies to be considered. The CAOs will also act in the capacity of selecting said company and preparing sample questions in advance to be used for the public polling. In their capacity as signing officers, the CAOs in their guidance to the Heads of Council will liaise with the successful bidder throughout the procurement process to ensure a successful conclusion."

FINANCIAL CONSIDERATIONS:

At this time, there do not appear to be any direct financial implications to the Township as Niagara Region is being tasked with the financial implementation of this project.

OTHERS CONSULTED:

Niagara Region Chief Administrative Officers

ATTACHMENTS:

Appendix "A":

- Niagara Region Correspondence re: Provincial Review of Regional Government (March 8, 2019)
- Local Area Municipal Mayors Correspondence re: Provincial Review of Regional Government (March 6, 2019)
- Statement from Niagara Mayors (February 4, 2019)

Respectfully submitted by,

William J. Kolasa,
Chief Administrative Officer/Clerk



Administration

Office of the Regional Clerk

1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

Telephone: 905-685-4225 Toll-free: 1-800-263-7215 Fax: 905-687-4977

www.niagararegion.ca

March 8, 2019

COTW 1-2019, March 7, 2019

LOCAL AREA MUNICIPALITIES

SENT ELECTRONICALLY

**RE: Provincial Review of Regional Government
COTW 1-2019 Minute Item 6.2**

Committee of the Whole at its meeting held on Thursday, March 7, 2019, passed the following resolution:

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A copy of Correspondence Item COTW-C 02-2019 is attached for your reference.

Yours truly,

A handwritten signature in black ink, appearing to read "Ann-Marie".

Ann-Marie Norio
Regional Clerk

CLK-C 2019-072



OFFICE OF THE MAYOR
4800 SOUTH SERVICE ROAD
BEAMSVILLE, ON L0R 1B1
Phone: 905-563-8205
Fax: 905-563-6566
www.lincoln.ca

March 6, 2019

Niagara Region
c/o Ron Tripp
Acting CAO

Dear Region of Niagara;
Re: Provincial Review of Regional Government

Following the recent conference call among the heads of Council of the lower tier municipalities including the Regional Municipality of Niagara it was agreed that the 12 Mayors and Chair, whom have signed below, request that the Region, on behalf of the 13 Municipalities undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise the 13 municipalities on government relations, public polling and communications in regard to the provincial government review of regional government.

Further, this item be included in the Committee of the Whole Agenda for [Thursday, March 7, 2019](#) at 6:30pm at Regional Headquarters.

The CAO's will coordinate this effort. They will advise on appropriate companies to be considered. The CAO's will also act in the capacity of selecting said company and preparing sample questions in advance to be used for the public polling.

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We are the Mayors and Regional Chair of the Region of Niagara and are in support of this request.

Mayor Wayne Redekop
Fort Erie

Mayor Jim Diodati
Niagara Falls

Mayor Bill Steele
Port Colborne

Mayor Kevin Gibson
Wainfleet

Mayor Jeff Jordan
Grimsby

Lord Mayor Betty Disero
Niagara-on-the-Lake

Mayor Walter Sendzik
St. Catharines

Mayor Frank Campion
Welland

Chair Jim Bradley
Niagara Region

Mayor Sandra Easton
Lincoln

Mayor Marvin Junkin
Pelham

Mayor Terry Ugolini
Thorold

Mayor David Bylsma
West Lincoln

Statement from Niagara Mayors

February 4, 2019

Niagara's Mayors are united in support for improving governance, transparency and accountability in local government. It has been nearly 50 years since Niagara Region was formed and our communities, economy and the populations we serve have changed significantly in that time. With change comes opportunity, and we agree with the provincial government that there is room for improvement in the way Niagara works.

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Marvin Junkin, Mayor of Pelham

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Wayne Redekop, Mayor of Fort Erie

Betty Disero, Lord Mayor of Niagara-on-the-Lake

Walter Sendzik, Mayor of St. Catharines

Sandra Easton, Mayor of Lincoln

Bill Steele, Mayor of Port Colborne

Kevin Gibson, Mayor of Wainfleet

Terry Ugulini, Mayor of Thorold



City of Welland
Legislative Services
Office of the City Clerk
60 East Main Street, Welland, ON L3B 3X4
Phone: 905-735-1700 Ext. 2280 | Fax: 905-732-1919
Email: clerk@welland.ca | www.welland.ca

March 25, 2019

File No. 19-48

SENT VIA EMAIL

Niagara Region
1815 Sir Isaac Brock Way
P.O. Box 1042
Thorold, ON L2V 4T7

Attention: Ann-Marie Norio, Regional Clerk

Dear Ms. Norio:

Re: March 19, 2019 – WELLAND CITY COUNCIL

At its meeting of March 19, 2019, Welland City Council passed the following motion:

“THAT THE COUNCIL OF THE CITY OF WELLAND receives for information the correspondence from the Regional Municipality of Niagara, COTW 1-2019, regarding the Provincial Review of Regional Government attached to Report CAO-2019-02 as Appendix I; and further THAT Welland City Council supports the Regional Municipality of Niagara in undertaking the procurement of and facilitation for finances to hire a Government Relations/Communications firm to conduct public polling and provide related communications with Niagara residents regarding the provincial government review of regional government.”

Yours truly,



Tara Stephens
City Clerk

TS/cap

c.c.: Local Area Municipal Clerks, sent via email
G. Long, Chief Administrative Officer

Bridging the past, present and future

COUNCIL
OFFICE OF THE CAO

APPROVALS	
GENERAL MANAGER	
CFO	
CAO	

19-59

REPORT CAO-2019-02
MARCH 19, 2019

SUBJECT: PROVINCIAL REVIEW OF REGIONAL GOVERNMENT – UPDATE

AUTHOR: GARY LONG, CAO

RECOMMENDATIONS:

THAT THE COUNCIL OF THE CITY OF WELLAND receives for information the correspondence from the Regional Municipality of Niagara, COTW 1-2019, regarding the Provincial Review of Regional Government attached to Report CAO-2019-02 as Appendix I; and further

THAT Welland City Council supports the Regional Municipality of Niagara in undertaking the procurement of and facilitation for finances to hire a Government Relations/Communications firm to conduct public polling and provide related communications with Niagara residents regarding the provincial government review of regional government.

ORIGIN AND BACKGROUND:

The Minister of Municipal Affairs and Housing, the Honourable Steve Clark, announced on January 15, 2019, that the province will be reviewing regional governments in Ontario. This review is limited to the following nine upper tiers and lower tier municipalities: Waterloo Region, Niagara Region, Halton Region, Peel Region, York Region, Durham Region, Oxford County, Simcoe County, and Muskoka District. Minister Clark has indicated that the focus of the review is governance, decision-making, and service delivery.

Michael Fenn and Ken Seiling have been appointed as special advisors to conduct this review and provide advice and recommendations to the Minister this summer. Mr. Fenn is a former Ontario Deputy Minister, previous municipal CAO in several Ontario cities, and founding CEO of Metrolinx. Mr. Seiling is a former Chair of Waterloo Region who held that position from 1985 to 2018 and was a Councillor and Mayor in Woolwich.

The twelve mayors in Niagara and the Regional Chair had individual meetings with the special advisors on February 11, 2019, to provide their input and perspective.

COMMENTS AND ANALYSIS:

As a follow-up to the meetings with the special advisors, a consensus was achieved by the Heads of Council of the Local Area Municipalities, including the Regional Municipality of Niagara, to hire a government relations/communications firm to engage the local area Councils, members of the public, and business sector to seek their opinion on the Regional Government Review. The Area CAOs will coordinate this initiative and oversee the procurement process to select the successful bidder. In addition, the Area CAOs will craft sample questions to be used for public engagement.

City of Welland Council and Welland Regional Councillors will be provided regular updates by the Head of Council throughout this process.

FINANCIAL CONSIDERATIONS:

Costs associated with this initiative will be borne by the Regional Municipality of Niagara.

OTHER DEPARTMENT IMPLICATIONS:

The City's Corporate Leadership Team continues to stay informed and engaged in this process and look forward to working with Council. City staff will also be kept informed.

SUMMARY AND CONCLUSION:

Staff recommend that Welland City Council supports that the Regional Municipality of Niagara undertake the procurement of and facilitation for finances to hire a Government Relations/Communications firm to advise Local Area Municipalities on public relations and undertake public engagement with respect to the Province's review of regional government in Niagara.

ATTACHMENTS:

Appendix I – Region of Niagara Correspondence COTW 1-2019, March 7, 2019

**Administration**

Office of the Regional Clerk

1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

Telephone: 905-685-4225 Toll-free: 1-800-263-7215 Fax: 905-687-4977

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March 8, 2019

COTW 1-2019, March 7, 2019

LOCAL AREA MUNICIPALITIES**SENT ELECTRONICALLY****RE: Provincial Review of Regional Government
COTW 1-2019 Minute Item 6.2**

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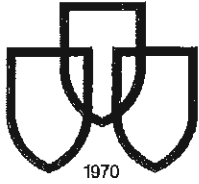
Yours truly,

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Ann-Marie Norio
Regional Clerk

CLK-C 2019-072

COTW-C 02-2019



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March 6, 2019

Niagara Region
 c/o Ron Tripp
 Acting CAO

Dear Region of Niagara;
Re: Provincial Review of Regional Government

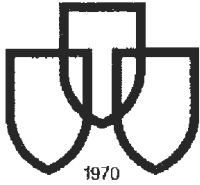
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We are the Mayors and Regional Chair of the Region of Niagara and are in support of this request.

Mayor Wayne Redekop
Fort Erie

Mayor Jim Diodati
Niagara Falls

Mayor Bill Steele
Port Colborne

Mayor Kevin Gibson
Wainfleet

Mayor Jeff Jordan
Grimsby

Lord Mayor Betty Disero
Niagara-on-the-Lake

Mayor Walter Sendzik
St. Catharines

Mayor Frank Campion
Welland

Chair Jim Bradley
Niagara Region

Mayor Sandra Easton
Lincoln

Mayor Marvin Junkin
Pelham

Mayor Terry Ugolini
Thorold

Mayor David Bylsma
West Lincoln

CLERK'S DEPARTMENT

March 26, 2019

Ann-Marie Norio, Regional Clerk
Niagara Region
1815 Sir Isaac Brock Way
Thorold, ON
L2V 4T7

Dear Ms. Norio,

Re: Provincial Review of Regional Government – COTW 1-2019 Minute Item 6.2

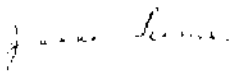
This is to confirm that on Monday, March 26, 2019, West Lincoln Township Council adopted the following resolution:

Resolution:

That, the correspondence from the Office of the Regional Clerk, dated March 8, 2019, relating to a letter (Item COTW-C 02-2019) from the Local Area Municipal Mayors requesting Niagara Region to hire a Government Relations/ Communications firm to advise the 13 municipalities on government relations, public polling and communications as it relates to the Provincial Review of Regional Government; be received and supported.

If you require further information or clarification do not hesitate to contact me.

Sincerely,



Joanne Scime
Clerk

cc. Local Area Municipal Clerks

From: [Regional Government Review \(MMA\)](#)
To: [Norio, Ann-Marie](#)
Subject: Regional Government Review Inputt
Date: Thursday, April 18, 2019 4:36:55 PM

CAUTION: This email originated from outside of the Niagara Region email system. Use caution when clicking links or opening attachments unless you recognize the sender and know the content is safe.

Dear Members of Regional Municipality of Niagara Council,

We are reaching out as we have received questions on how council members may participate in the review consultations. Council members affected by the review are welcome to participate in the ongoing open consultation process for the review. We have already received a few direct submissions from some individual members of council included in the review, and we want to encourage this to continue. Understanding the diversity of opinion and experience continues to be of vital importance to the review process so if any council members want to share their ideas and opinions with us as a written submission, we encourage them to do so.

Some Councils may wish to provide written submissions and these would be received as well by us as the Special Advisors. We want to provide the Minister of Municipal Affairs and Housing with the best advice on regional governance, so the full range of perspectives and thoughts on how to improve governance, decision-making and service delivery are important as we consider our recommendations to the Minister.

More information about the submission process, can be found on the ministry's [review webpage](#). As always, any questions about the review can be directed to regionalgovreview@ontario.ca

Sincerely,

Ken Seiling and Michael Fenn

Special Advisors to the Minister of Municipal Affairs and Housing's Regional Government Review

MEMORANDUM

CL-C 35-2019

Subject: Parameters of Regional Matching Funding for Smarter Niagara Incentive Program Tax Increment Grants

Date: April 25, 2019

To: Regional Council

From: Rino Mostacci, MCIP, RPP, Commissioner

The purpose of this memo is to provide Council with information regarding the parameters of Regional matching funding for Smarter Niagara Incentive Program (SNIP) Property Rehabilitation and Redevelopment Tax Increment Funding Grant (Tax Increment Grant).

SNIP is a suite of nine Regional incentive programs providing matching funding for eligible local projects approved through Local Municipal Community Improvement Plan programs. SNIP incentives are generally divided into two groups:

- “Simple Grants,” funded through an annual line item in the Levy budget (\$600,000 in 2019) and are requested and approved through a quarterly first come/first served basis. (e.g., Building and Façade Improvement Grant)
- “Tax-Related Grants” often larger financial commitments of longer duration than simple grants. They are funded differently than the simple grants, through an annual deduction from assessment growth prior to the Regional Levy Budget process. (e.g., Non Gateway TIG’s)

Eleven of the twelve LAMs have CIP programs, offering a range of incentive types and the Region matches over fifty of these programs by way of either Simple or TIG grants through SNIP. There is funding in the 2019 budget for all invoices for Local TIG s approved prior to the initiation of the incentive review.

In 2002 by way of CAO 8-2002, Regional Council approved the first of the core SNIP incentives, including tax increment grants, with the stated purpose of promoting:

- Downtown Redevelopment
- Brownfield Redevelopment
- Heritage Restoration/Preservation
- Residential Intensification/Affordable Housing

Over the years there have been revisions and additions to the SNIP suite of programs, with the most recent comprehensive review coming in 2011 (ICP 97-2011, Appendix 1).

There was one substantive change in the 2011 review to the SNIP Tax Increment Grant program, which was to increase the Regional percentage for Brownfield Tax Increment Grants to a minimum of 75%. Otherwise there are few parameters for the Regional SNIP Tax Increment Grant program, which essentially matches the eligible Local Municipal program contained in the Local Community Improvement Plan as follows:

F-2 Property Rehabilitation and Redevelopment Tax Increment Funding Program

*The Property Rehabilitation and Redevelopment Tax Increment Funding Program is administered by the Local Municipalities. The general administration of this program is outlined in **Figure F-2** below. This program will continue to be administered by the Local Municipalities as shown in Figure F-2, with the following recommended program revisions:*

- a) The Region will continue to match the percentage and duration of any local property rehabilitation and redevelopment tax increment grant paid by the local municipality, but if the project is a brownfield redevelopment project, affordable housing project, or it conforms to the Region's Smart Growth design criteria, it will receive a minimum 75% Regional Property Rehabilitation and Redevelopment Tax Increment Grant;*
- b) Local Municipal staff will notify Regional staff of the annual amount of the Regional tax increment grant and obtain Regional staff concurrence on the amount;*
- c) When the Local Municipality collects the annual property taxes, the Local Municipality will retain the Regional tax increment grant amount and provide a single payment to the successful applicant of the Local/Regional tax increment grant; and,*
- d) The Local Municipality will forward the balance of the Regional property taxes collected on that property to the Region as normal.*

(p. 77 of 2011 Review)

Currently when a LAM requests Regional matching funding for a SNIP Tax Increment Grant, it submits a "SNIP TIG Regional Funding Approval Request Form", a copy of the Local Municipal report approving the project, and a copy of the executed agreement for the project. Regional staff then review these documents and calculate the estimated Regional grant amount and payment schedule. If it is conforming, Regional funding is

approved by staff through delegated authority. Non-conforming project requests go before Regional Council for consideration.

A review of many Regional incentives including the SNIP suite is underway and a report on the financial implications of SNIP TIG and other Regional incentives is anticipated come before Planning and Economic Development Committee on May 8, 2019. A presentation on Regional incentives is planned for the Committee of the Whole meeting on June 6, 2019, with further reports on Regional incentives and the ongoing review.

Respectfully submitted and signed by

Rino Mostacci, MCIP, RPP
Commissioner, Planning and Development Services

Appendix 1 ICP 97-2011 Review and Update of the Smarter Niagara Incentive Programs

Niagara Region

REPORT TO: Chair and Members of the
Integrated Community Planning Committee

SUBJECT: Review and Update of the *Smarter Niagara* Incentive Programs

RECOMMENDATIONS

That this Committee recommend to Regional Council:

1. That the Review and Update of the *Smarter Niagara* Incentive Programs, accessible via Review and Update of the Smarter Niagara Incentive Programs, November 2011 be received.
2. That the revisions to the *Smarter Niagara* Incentive Programs as outlined in the Review and Update of the *Smarter Niagara* Incentive Programs, as summarized in the Appendices be approved.
3. That consistent with Council Direction as approved in Report EDTF 2-2011, the position of 'Expediter' (referred to in this report as the CIP Coordinator) be reinstated.
4. That a copy of this report be sent to all local municipalities for information.

EXECUTIVE SUMMARY

The *Smarter Niagara* Incentive Programs (SNIP) provides incentives to local municipalities for projects that are consistent with Council's *Smarter Niagara* strategy. The *Smarter Niagara* Incentive Programs were introduced in 2003 and since that time 10 out of 12 local municipalities have adopted a total of 19 Community Improvement Plans (CIPs) with two more currently being prepared. Within these CIPs, funding provided by both the Region and the local municipalities has generated approximately \$73 million in new development, an overall return on investment ratio of approximately 9:1.

Since the introduction of the SNIP in 2003, changes to Provincial and Regional policy as well as a number of lessons learned from implementing the Program at both the local and Regional level have indicated that a comprehensive review and update of the SNIP was in order.

It is now proposed after extensive stakeholder and public consultation including consultation with the Municipal CIP Contact Group, *Smarter Niagara* Steering Committee, Niagara Culture Committee and others that the original core programs should be maintained and for the most part strengthened. Further there is strong support to broaden the SNIP by introducing new programs to address the need for affordable housing and to support agriculture. As such, the proposed revisions to the existing programs, the introduction of new programs and administrative changes as outlined in Appendix I and contained in the full report be approved by Regional Council.

The review and update of the *Smarter Niagara* Incentive Programs aligns well with many of the current and proposed Council Business Plan priorities. For example, the recommendations in this report support Council Objectives related to being a Responsive Region, Community and Social Well Being, and Open for Business.

FINANCIAL IMPLICATIONS

Pending Council's consideration of the recommendations contained in this report, the SNIP review and recommendations result in the following financial implications for Council:

1. Changes to some of the programs being proposed will result in increases to the Region's maximum matching contribution.
2. Additional programs are being proposed to support affordable housing and agriculture.
3. More local municipal CIPs are being adopted and implemented than in past years, resulting in anticipated higher levels of uptake for existing, expanded and new programs.
4. Recommendations relating to improving the administration of these programs include the provision for a CIP Coordinator, similar to the former expeditor role once housed in the Niagara Economic Development Corporation (NEDC).

In an effort to manage these pressures while recognizing the importance of the SNIP in providing significant investment to Niagara's communities, Integrated Community Planning (ICP) staff have brought forward two requests associated with the SNIP review to be considered for the 2012 budget. These budget requests, which have been highlighted in the ICP budget, and outside of the proposed ICP base budget, include:

- An additional \$250,000 per year to satisfy the program enhancements and an anticipated overall increase in SNIP applications;
- Approximately \$100,000 per year for a CIP Coordinator, pending further work on the transition of the economic development function to identify where and how this resource is allocated. Given these funds are recommended to be sought from the NEDC base budget; it is expected to have no net increase on the levy in 2012.

As referenced in Report EDTF 2-2011, the former expediter function:

“had previously been resourced by the Region (i.e. an original base budget transfer from the Region to NEDC in the amount of \$75K). These funds supported the hiring of an ‘Expediter’, one whose role was to help land developers traverse the often confusing development approvals system, as well as assure ready access to the suite of Smarter Niagara Incentives. Some key changes have taken place since the original Expediter role was created – the planning function has been streamlined (to work toward eliminating confusion and instilling a customer service ethos); the Smarter Niagara Incentives are being broadened to be a primary implementation tool kit for the Gateway Economic Zone and Centre, meaning more direct support to encouraging development activity; however, the Expediter position itself was summarily eliminated.

There has been a clear message from the development industry that this role needs to be reinstated – given that the ‘one stop shop’ is a clear guiding principle in the Council-approved economic development model, it is appropriate that this role be reinstated internally, where the incentives are administered with direct linkage to coordinating Community Improvement Plans and to development approvals.”

PURPOSE

The purpose of this report is to present the results of the recent review of the *Smarter Niagara* Incentive Programs. The review has recommended updates to existing programs, the introduction of new programs and administrative changes. These changes are being presented to Council for consideration.

REPORT

Background

Established by Regional Council in 2003, the *Smarter Niagara* Incentive Programs is a comprehensive framework of financial incentives to encourage downtown revitalization and brownfield redevelopment within existing urban areas. The SNIP supports efforts to revitalize existing building stock, infrastructure and public amenities as a financially-viable and more sustainable alternative to costly new Greenfield development.

In order for a local municipality to access the SNIP it must adopt a Community Improvement Plan (CIP) containing programs that align with those included in the SNIP. To date, 10 out of the 12 local municipalities have adopted a total of 19 CIPs with two more currently being prepared. Seventeen of the 19 adopted CIPs are currently being implemented. As completion of a municipal CIP is a prerequisite for accessing the incentives, some lag time between the initiation of a CIP and the uptake of incentives by the private sector is expected. Despite this, the period between 2003 and 2009

witnessed the five municipalities who were actively offering incentive programs approve a total of 178 applications in central urban areas and on brownfield sites. These 178 applications translated into approximately \$73 Million in development and included the construction of 733 residential units. Overall to-date, the SNIP has generated a return on investment ratio of approximately 9:1. It should be noted that this figure does not count private sector investments beyond those tied to incentives.

While the majority of the current *Smarter Niagara* Incentive Programs were introduced in 2003, there have been a number of revisions to the programs with some new programs being added. At the present time, the *Smarter Niagara* Incentive Programs includes the following:

1. Reduction of Regional Development Charges
2. Property Rehabilitation and Redevelopment Tax Increment Funding Program
3. Building and Facade Improvement Grant/Loan Program
4. Residential Grant Loan Program Heritage Restoration and Improvement Grant/Loan Program
5. Environmental Assessment Study Grant Program
6. Public Domain Incentives Program

A number of factors have combined to suggest that a review of the current suite of incentive programs is now in order. The program has not been subject to a comprehensive review since its inception in 2003. More specifically, changes in Provincial and Regional policy namely the introduction of the Provincial Growth Plan and Regional Policy Plan Amendment 2-2009 in combination with the maturation of the Programs has produced a number of lessons learned from implementing the SNIP at both the Regional and local municipal level.

SNIP Review Process

A key component of the SNIP review was stakeholder consultation. Input was sought from the CIP Contact Group (made up of representatives of each of the municipalities that has a CIP in place and is participating in the *Smarter Niagara* Incentive Programs) and Regional staff responsible for key policy areas. To evaluate the effectiveness of the Programs, local stakeholders (such as members of the development community and affordable housing providers) who have utilized or who are affected by the Programs were directly interviewed. The key stakeholders reinforced the need to review and update the *Smarter Niagara* Incentive Programs at this time.

Input was also sought from a number of Regional committees such as the *Smarter Niagara* Steering Committee, Niagara Culture Committee, Niagara Gateway Economic Zone and Centre Committee and Niagara Agricultural Task Force. To receive further feedback, the Region hosted a Stakeholder Consultation Session Workshop on November 24, 2010 and a Public Meeting on March 23, 2011. In all instances, input received from all sources has been incorporated, where appropriate in the final document.

The recommendations outlined in Appendix II can be characterized as program adjustments, new programs or administrative changes. Table 1 in Appendix II contains a list of the existing *Smarter Niagara* Incentive Programs available to the local municipalities. Table 1 also provides background information regarding the purpose and details of the individual incentive program and proposed revisions to the particular program.

Recommended Program Adjustments

The original core programs have been maintained and the for the most part strengthened by increasing the Region's level of financial contribution. The local municipality will have the option to match the increased Regional contribution. With respect to the reduction in Regional Development Charges, the proposed revisions include allowing for the redevelopment of brownfields outside of downtowns to be eligible. Further if a project is on a brownfield sites located in a designated central area then there will be automatic increase in the Regional Development Charge reduction from 50% to 75%, in addition to a 25% reduction based on the project meeting 3 out of 5 Smart Growth criteria.

Recommended New Programs

Stakeholder consultation has suggested that a number of new incentive programs should be considered in order to address identified existing program gaps and key future priorities. These gaps include the provision of affordable housing and the promotion of farm building rehabilitation to support new forms of agriculture and value added secondary production. Accordingly, the proposed new *Smarter Niagara* Incentive Programs shall expand to include the Affordable Housing Grant/Loan Program, Agricultural Feasibility Study Grant and the Agricultural Buildings and Facilities Revitalization Study Grant. The new agricultural incentives are being introduced in order to breathe life into value added agriculture and farm innovations aimed at growing the agricultural sector's profitability. A description of these new programs is contained in Table 1 of Appendix II and further highlighted in the full SNIP Review report accessible via the earlier provided weblink.

The SNIP review also identified a clear need to support cultural heritage and art. The use of incentives within a CIP is limited in its ability to address the critical needs of cultural heritage and arts groups as incentives can only be utilized for activities that involve the development, redevelopment, construction and reconstruction of lands and buildings. In many cases, local CIPs can define what qualifies as a "building improvement" to support culture. (for example, support for live-work studio or performing art spaces). Further, public art is already funded through the public realm improvement grant. Given the identified need to strengthen support for cultural heritage and arts activities, staff will work with the CIP Coordinators and other key stakeholders, such as the Culture Committee to examine opportunities to strengthen cultural objectives through local CIPs.

Recommended Administrative Improvements

Though the current administration of the *Smarter Niagara* Incentive Programs was generally viewed as effective, two important improvements were identified that would make the SNIP more efficient, timely and responsive to users. First, to avoid a time delay for an applicant receiving full payment of a grant or loan it is proposed that the local municipality will resume front ending the Region's share of the payment and then recover this payment from the Region through a regular reimbursement (e.g. monthly or quarterly) accounting. As the number of applications requesting SNIP funding is anticipated to increase, the current practice of requesting Regional reimbursement on an application by application basis will become more time consuming and cumbersome for staff at both the local and Regional levels.

The second significant administrative improvement that was identified for the *Smarter Niagara* Incentive Programs is to have a single person at the Region responsible for co-ordinating and responding to local CIP program issues. Currently a SNIP application, depending on the type, may be handled by up to three Regional departments. A dedicated SNIP Co-ordinator would help to clarify and standardize program requirements and administrative procedures and provide enhanced customer service and one stop shopping to those accessing the *Smarter Niagara* Incentive Programs. This is expected to be addressed through the Economic Development Transition plan.

Finally as a result of stakeholder consultation, the Regional Niagara Bicycling Committee forwarded a report for consideration to the SNIP review recommending the Region cost share in the preparation of local municipal bicycle master plans. This report recommends that the *Smarter Niagara* Incentive Programs not be utilized to fund local planning work beyond the preparation of local CIPs. Pending Council direction, staff will investigate alternative funding avenues in combination with the preparation of funding guidelines to assist in the preparation of bicycle master plans and other important local municipal policy work.

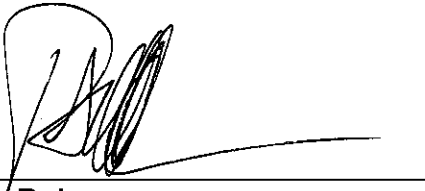
Recommended Budget Revisions

The Region has been budgeting approximately \$750,000 per year for the implementation of the SNIP. It is anticipated that the demand for Regional funding to assist in the preparation of local municipal CIPs will decrease as most of the local municipalities have now prepared their CIPs. However, the number of local municipalities implementing adopted CIPs will increase and this will translate into an overall increase in applications. Consequently, the broadening of the *Smarter Niagara* Incentive Programs combined with increases to maximum Regional funding levels and an overall anticipated increase in applications will stress the current annual funding level of \$750,000. To address the expected draw upon the SNIP budget, it is proposed that the annual budget be increased to \$1 Million which is in accordance with the proposed budget request for 2012.

CONCLUSION

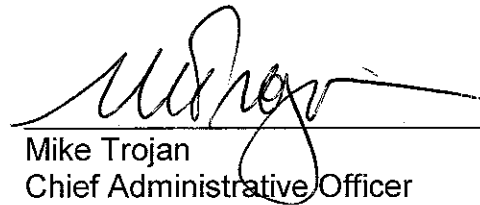
The cost effective *Smarter Niagara* Incentive Programs have served for years as a model of partnership between Niagara Region and local municipalities to promote urban area revitalization and Smart Growth. As a result of this strong partnership, the SNIP has played a key role in assisting the local municipalities in the revitalization of their downtowns and brownfield areas. After extensive consultation, the Program and administrative changes put forth by the SNIP review will not only strengthen and improve the effectiveness and responsiveness of the Program but also strengthen the Regional/local partnership and as such should be supported.

Submitted by:



Patrick Robson
Commissioner
Integrated Community Planning

Approved by:



Mike Trojan
Chief Administrative Officer

This report was prepared by Brian Dick, MCIP, RPP, Policy Planner, and reviewed by Curt Benson, MCIP, RPP, Manager, Policy Planning, Mary Lou Tanner, MCIP, RPP, Associate Director, Regional Policy Planning and Kirk Weaver, Director, Community and Corporate Planning.

APPENDIX

Appendix I	Executive Summary (RCI Consulting Review and Update of the Smarter Niagara Incentive Programs	Page 8
Appendix II	Table 1 – Recommended <i>Smarter Niagara</i> Incentive Program Revisions	Page 14
Appendix III	Table 2 – <i>Smarter Niagara</i> Steering Committee's Recommendations and Staff Comments on the SNIP Review	Page 16

Review and Update of the Smarter Niagara Incentive Programs

EXECUTIVE SUMMARY

Background

The Smarter Niagara Incentive Programs are a comprehensive framework of financial incentive programs designed to promote Smart Growth in Niagara. These programs were endorsed by Regional Council in 2002 and efforts have been ongoing to implement the Smarter Niagara Incentive Programs since 2003. The Region has budgeted and disbursed significant funds for implementation of these programs. Numerous local municipalities in Niagara Region have taken advantage of funding from the Smarter Niagara Incentive Programs by adopting community improvement plans (CIPs) that contain complementary incentive programs.

The Smarter Niagara Incentive Programs currently include the following programs:

- 1) Reduction of Regional Development Charges;
- 2) Property Rehabilitation and Redevelopment Tax Increment Funding Program;
- 3) Building and Facade Improvement Grant/Loan Program;
- 4) Residential Grant/Loan Program;
- 5) Heritage Restoration and Improvement Grant/Loan Program;
- 6) Environmental Assessment Study Grant Program; and,
- 7) Public Domain Incentives Program.

The private sector has responded to these incentive programs by initiating dozens of residential, commercial and mixed use development and redevelopment projects in central urban areas and on brownfield sites.

Since introduction of the Smarter Niagara Incentive Programs in 2003, a number of factors have combined to suggest that a review and update of the programs is now in order. This includes:

- a) Adoption of Regional Policy Plan Amendment (ROPA) 2-2009 which implements the Region's Growth Management Strategy (Niagara 2031);
- b) Results of CIP programs and lessons learned in a number of municipalities such as St. Catharines and Niagara Falls that have had incentive programs in place for several years;
- c) Input from Local/ Regional staff and program users regarding the current programs; and,
- d) Evolving incentive program best practices, including the use of incentive programs that promote energy efficiency and sustainable planning and development.

The purpose of this report is to review the Smarter Niagara Incentive Programs and provide recommendations for the updating of these programs.

Methodology

The recommendations contained in this report were developed using a comprehensive methodology to review the existing Smarter Niagara Incentive Programs. This review included completion of the following tasks:

- a) A review of key Regional policy documents and reports to determine policy direction for

- the Smarter Niagara Incentive Programs;
- b) A review of best practices used by other Ontario municipalities to promote the types of community improvement and economic development identified in the policy review;
 - c) Review and quantitative analysis of the results of the Smarter Niagara Incentive Programs from 2003 until the end of 2009;
 - d) Interviews with Regional staff, Local Municipal CIP Coordinators and other key stakeholders who have utilized or are affected by Local/Regional incentive programs;
 - e) The identification of program gaps, possible improvements, administrative issues and future program needs and priorities for the Smarter Niagara Incentive Programs;
 - f) Preparation of a Draft Preliminary Incentive Program Concepts Report;
 - g) Presentation of the Draft Preliminary Incentive Program Concepts Report at a Stakeholder Consultation Session and Workshop on November 24, 2010 and review of comments received during and after the Stakeholder Consultation Session and Workshop;
 - h) Preparation of Revised Preliminary Incentive Program Concepts and presentation of the these concepts at a public meeting held on March 23, 2011;
 - i) Preparation of a Draft Report in September of 2011 and circulation and presentation of this Draft Report to the Local Municipal CIP Coordinators in October of 2011; and,
 - j) Preparation of this Final Report.

In addition to the stakeholder consultation sessions and the public meeting noted above, project results and progress updates were presented to various committees during the process, including the Smarter Niagara Steering Committee.

Smarter Niagara Incentive Program Funding and Results

The Region has a long standing program of providing its local municipalities funding for the preparation of community improvement plans and by the end of 2010, the Region of Niagara had paid out or committed a total of \$603,500 for the preparation of local CIPs. In addition to the funding for preparation of CIPs, the Region has committed just under \$775,000 toward public realm improvement projects in five local municipalities, and an additional \$199,675 for advanced visualization projects in three local municipalities. In total, by the end of 2010, the Region had committed \$1,577,550 in funding for Local CIPs, public realm improvement projects and advanced visualization.

In terms of Smarter Niagara Incentive Program funding provided to the Local Municipalities in Niagara, the Local Municipalities in Niagara approved a total of 178 incentive program applications between 2003 and 2009. Five municipalities in Niagara were actively offering incentive programs over the period 2003 to 2009, and this includes 61 approved applications in St. Catharines, 59 in Niagara Falls, 36 in Niagara-on-the-Lake, 14 in Welland, and 8 in Thorold. The number of municipalities in Niagara offering incentive programs through Local CIPs has now increased to ten, with several municipalities in Niagara recently adopting CIPs.

The total contribution from the Region to the funding of the 178 Local Municipal incentive program applications approved between 2003 and 2009 is estimated at \$3,210,818 and the total contribution from the Local Municipalities is estimated at \$4,005,440. A total of \$7,216,259 in Regional/Local Municipal funding was committed to the projects taking advantage of funding available through CIP programs, and this \$7,216,259 in Local/Regional funding will generate approximately \$65,909,672 in private sector construction investment and a total public/private

investment of well over \$73,000,000 a result of the construction of the committed projects. This represents a healthy overall leverage ratio of approximately 9.1 times the Regional/Local investment.

Critical Needs

In order to determine critical needs for improvement to the Smarter Niagara Incentive Programs, interviews were conducted with Local CIP Coordinators, other Local Municipal staff, Regional staff, and key stakeholders from the development community. In total, 23 people were interviewed. The results of these interviews were augmented by the Background Policy Review and feedback received from the Smarter Niagara Steering Committee in order to identify the key critical needs for incentive program revisions and possible new programs.

Generally, those interviewed felt the existing Smarter Niagara Incentive Programs are both appropriate and effective. There was a strong desire to increase maximum incentive program amounts, including the Regional contribution, wherever possible so as to improve the applicability and effectiveness of the incentive programs. It was also noted that in order to spur more brownfield redevelopment projects, the difference in funding available between brownfield and non-brownfield projects needs to be greater.

While the current administration of the Smarter Niagara Incentive Programs was generally viewed as effective, a number of possible improvements were identified. Some Local Municipalities do not front-end the Region's share of grants and loans, including tax increment grants. This practice creates a time delay prior to the applicant receiving full payment of the grant or loan as compared to the practice of the Local Municipality front-ending the Region's share of the payment and then recovering this payment from the Region through a regular reimbursement (e.g., monthly or quarterly) accounting. The latter practice is how the Smarter Niagara Incentive Programs were originally designed to operate, and is seen as an improvement over the current two-step process employed by some Local Municipalities.

Another significant administrative improvement that was identified is to have a single staff person at the Regional level (a Smarter Niagara Incentive Programs Coordinator) responsible for coordinating and responding to local CIP program issues. It was felt that this would help to clarify and standardize program requirements and administrative procedures. The need for such a coordinator at the Regional level will likely increase as more municipalities implement their CIPs and therefore request Regional funding from the Smarter Niagara Incentive Programs.

The need for a separate program to promote the construction of affordable housing was identified as a program gap. Another program gap identified by both those interviewed and through the policy review is the need for incentives that promote more sustainable forms of urban development and healthy communities in order to help achieve the goals of the Regional Growth Management Strategy. This includes developments that incorporate LEED certified buildings and neighbourhoods, green buildings, higher densities, and better quality urban design. The promotion of farm building rehabilitation, new forms of agriculture and value added secondary production in agricultural areas was identified as a program gap. Financial support for cultural heritage, including the arts, was also identified as a program gap. However, because Section 28 of the *Planning Act* restricts grants and loans to community improvement activities that are property/building based, the ability to provide meaningful incentives to cultural heritage groups

through a CIP is very limited. Finally, incentive programs to help attract development to the employment lands in the Niagara Gateway Economic Zone and Centre were identified as a future priority. These programs will be developed as part of the Niagara Gateway Economic Zone and Centre CIP. Therefore, these programs are not presented in this report.

Recommendations

The recommended revisions to the existing Smarter Niagara Incentive Programs and the recommended new programs to be added to the Smarter Niagara Incentive Programs are summarized in the Table 1 of Appendix II followed by the administration, budget and other recommendations.

Administration Recommendations

CIP Contacts Group

It is recommended that the CIP Contacts Group being meeting again on a regular basis (3 to 4 times per year) and that Regional staff coordinate these meetings, take meeting notes, and disseminate these notes to all members of the CIP Contacts Group.

Smarter Niagara Incentive Programs Coordinator

It is recommended that the Region establish an Incentive Programs Coordinator position and that this position be responsible for a number of roles, including but not necessarily limited to:

- a) acting as a liaison between Local Municipal CIP coordinators staff and Regional planning, finance, legal and other staff with regards to the administration of the Smarter Niagara Incentive Programs;
- b) receiving, processing and administering requests for matching Regional program assistance from the Local Municipalities;
- c) planning and coordinating meetings of the CIP Contacts Group, including the dissemination of meeting notes and required follow-up;
- d) marketing the Smarter Niagara Incentive Programs to property owners, developers, and others both within and outside the Region;
- e) monitoring Smarter Niagara Incentive Program spending and results and reporting these results to Regional Council on a regular basis;
- f) liaising with Local Municipal CIP coordinators to obtain monitoring data, and ensure this data is collected and organized in a consistent and standardized manner;
- g) developing revisions to the Smarter Niagara Incentive Programs based on monitoring results and ongoing input from the Local Municipal CIP coordinators and other key stakeholders; and,
- h) acting as a project expeditor in relation to project issues involving the Smart Growth Incentive Programs.

It is recommended that the Incentive Programs Coordinator position be a full-time position and that one Regional staff person be dedicated solely to the responsibilities outlined above.

Incentive Program Monitoring and Reporting

It is recommended that the:

- a) Region in consultation with Local Municipalities develop a standardized framework for monitoring and reporting incentive program funding (inputs) and economic and other impacts (outputs);
- b) Incentive Programs Coordinator be responsible for assisting in the development of this standardized incentive programs monitoring and reporting framework; and,
- c) Incentive Programs Coordinator would be responsible for assembling data from Regional departments and the Local Municipalities and providing an annual report and updates (as required) regarding progress on implementation of the Smarter Niagara Incentive Programs to the Smarter Niagara Steering Committee and Regional Council.

Financial Administration

It is recommended that the Smarter Niagara Incentive Programs be financially administered as originally intended, i.e., with Local Municipalities front-ending the Region's share of any approved incentive program payment, and the Region then reimbursing the Local Municipality on a regular basis.

Budget Recommendations

It is recommended that:

- a) a portion of the total annual budget for the Smarter Niagara Incentive Programs be dedicated to the Public Domain Incentives Program;
- b) advanced visualization exercises no longer be funded from the Smarter Niagara Incentive Programs budget; and,
- c) Local Municipal plans and planning exercises/work other than Local Municipal CIPs not be funded from the Smarter Niagara Incentive Programs budget.

It is recommended that if the Region approves the recommended increase in Regional funding levels for the existing Smarter Niagara Incentive Programs and the new programs recommended in this report, then the Region should consider increasing the annual budget amount allocated to the Smarter Niagara Incentive Programs by up to \$250,000.

Other Recommendations

Marketing of the Smarter Niagara Incentive Programs

Once the Smarter Niagara Incentive Programs have been revised, it is recommended that the Region, led by the Incentive Programs Coordinator:

- a) prepare a Primer on the Smarter Niagara Incentive Programs that describes the available programs and how they integrate with locally available CIP incentive programs, including general information on program eligibility, application and administration procedures;
- b) Enhance the marketing of the Smarter Niagara Incentive Programs including:
 - i) presentations to development industry representatives and their support

- professionals (planners, engineers, architects, real estate professionals, financial institutions, lawyers, accountants, environmental consultants, etc....);
- ii) a semi-annual newsletter containing profiles of successful projects across the Region that have utilized the Smarter Niagara Incentive Programs;
- iii) preparation and updating of marketing materials such as brochures and/or pamphlets that provide summary information on the Smarter Niagara Incentive Programs and accompany the Primer on the Smarter Niagara Incentive Programs;
- iv) enhancement of the Region's web page via addition of direct (one-click) access to information on the Smarter Niagara Incentive Programs, the aforementioned newsletter and marketing materials, and direct links to the Local Municipal CIP program and application materials.

Agricultural CIP(s)

It is recommended that prior to developing and implementing the new programs recommended in this report to promote new forms of agriculture and value added secondary production in agricultural areas, the Region discuss the issue of agricultural incentives with local municipalities to determine their level of interest and ability/willingness to fund these programs in partnership with the Region.

Depending on the response from the local municipalities, it is then recommended that the Region in consultation with interested local municipalities consider preparation and adoption of a "Master Agriculture CIP" or individual Local Agriculture CIPs that local municipalities in Niagara can adopt to promote agriculture and that contain at a minimum the incentive programs recommended in Sections 8.2.2 and 8.2.3 of this report.

Provincial Participation in the Smarter Niagara Incentive Programs

It is recommended that the Province cost share with the Region and its Local Municipalities in the Smarter Niagara Incentive Programs because these programs clearly help achieve Provincial policies such as the Places to Grow Growth Plan for the Greater Golden Horseshoe.

A. TABLE 1: RECOMMENDED SMARTER NIAGARA INCENTIVE PROGRAM REVISIONS

	Program Name	Purpose	Status	Details	Proposed Program Revisions
1	Reduction of Regional Development Charges	To promote development, redevelopment and intensification of residential, commercial and institutional uses.	Existing	The Region offers a reduction of 50% of the Regional Development Charge for residential, commercial or institutional development or conversion of these existing buildings to these uses. An additional regional Development Charge reduction is available to developments that include at least 3 of the 5 Region's Smart Growth Design Criteria.	<ul style="list-style-type: none"> Allow industrial redevelopment of brownfields outside downtowns to be eligible Develop more detailed and complete Regional Smart Growth Design Criteria. If a project is on a brownfield site located in a designated central urban area increase Regional Development Charge reduction to 75% + 25% reduction based on Smart Growth criteria.
2	Property Rehabilitation and Redevelopment Tax Increment Funding Program	To stimulate building and property rehabilitation or redevelopment.	Existing	The Region will match the percentage and duration of the tax increment generated by the rehabilitation or redevelopment project that is paid by the municipality in the form of a grant to the applicant.	<ul style="list-style-type: none"> Continue matching principle, but if the project is a brownfield, affordable housing or conforms to the Regional Smart Growth Design Criteria, provide minimum 75% Regional Tax Increment Grant.
3	Building and Façade Improvement Grant/Loan Program	To promote structural improvement of buildings and/or improvement of building facades.	Existing	The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per property, or a matching loan from the Region of \$10,000 per property.	<ul style="list-style-type: none"> Clarify that the program (including grant/loan amount) applies to building improvements and/or facade improvements Increase matching Regional grant for front facade improvement to \$10,000. Introduce matching Regional grant/loan for side and or rear facade improvements to a maximum of \$10,000 per property. All facade improvements must conform to Local Design Guidelines or Regional Model Urban Design Guidelines.
4	Residential Grant/Loan Program	To promote residential conversion, infill and intensification.	Existing	The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per unit, or a matching loan of \$10,000 per unit. Maximum of 20 units per property for a grant or loan.	<ul style="list-style-type: none"> Increase matching Regional grant to \$7,500 per unit.

	Program Name	Purpose	Status	Details	Proposed Program Revisions
5	Heritage Restoration and Improvement Grant/Loan Program	To promote restoration and improvement of buildings designated under the Ontario Heritage Act.	Existing	The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$2,500 per residential property and \$10,000 per commercial or industrial property.	<ul style="list-style-type: none"> • Increase matching grant/loan from Region for designated residential property to \$5,000 and to \$15,000 for designated commercial/industrial property. • Add properties designated under Part V of <u>Ontario Heritage Act</u> (heritage districts) as eligible properties for Regional program.
6	Environmental Assessment Study Grant Program	To promote the undertaking of environmental site assessments.	Existing	The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per study to promote the completion of a Phase II Environmental Site Assessments, Remedial Action Plans and Risk Assessments, and a maximum of two studies per property.	<ul style="list-style-type: none"> • No changes are proposed to this Program.
7 135	Public Domain Incentives Program	To support public realm improvements that are identified in or in compliance with municipal planning documents.	Existing	The Region will provide a matching grant on a cost shared basis with the local municipality to a maximum grant of \$100,000 per project to support public realm improvements.	<ul style="list-style-type: none"> • In addition to current program criteria, applications should be evaluated using Region's more detailed Smart Growth Design Criteria.
8	Grant Program for Affordable Housing	To assist in the creation of affordable housing.	Proposed New	The Region will provide a matching grant or loan equal to \$7,500 for affordable housing up to 20 units per property/project. An affordable housing project would be eligible to apply for the existing Residential Grant/Loan Program and this new Program.	<ul style="list-style-type: none"> • No revisions required as this is a new proposed <i>Smarter Niagara</i> Incentive Program.
9.	Agricultural Feasibility Study Grant	To promote the undertaking of agricultural feasibility studies.	Proposed New	The Region will provide a matching grant equal to \$7,500 for studies that determine if existing agricultural/rural buildings and facilities can be converted or adapted for new agricultural uses.	<ul style="list-style-type: none"> • No revisions required as this is a new proposed <i>Smarter Niagara</i> Incentive Program.
10.	Agricultural Building and Facilities Revitalization Grant	To promote the restoration and improvement of existing agricultural buildings and facilities.	Proposed New	Matching tax increment grant for up to 10 years for physical improvements to agricultural properties, buildings and facilities that promote farm building rehabilitation, conversion to bio-fuels, new forms of agriculture, and value added secondary production.	<ul style="list-style-type: none"> • No revisions required as this is a new proposed <i>Smarter Niagara</i> Incentive Program.

B. Table 2: *Smarter Niagara* Steering Committee's Recommendations and Staff Responses on the SNIP Review

Incentive Program	<i>Smarter Niagara</i> Steering Committee Recommendation	Regional Staff Reply	Regional Staff Recommendation
Reduction of Regional Development Charges	Change the percentages in the Regional Development Charge Reduction from 75% and 25% to 50% and 50%.	Critical needs analysis/stakeholder consultation identified that there currently may not be enough of a financial incentive to encourage brownfield development.	The Committee's recommendation cannot be supported. To further encourage brownfield development, a project located on a brownfield site in a designated central urban area will receive an automatic 75% Regional Development charge reduction. The additional 25% reduction could be achieved through incorporation of at least three of the Region's five Smart Growth design criteria.
Property Rehabilitation and Redevelopment Tax Increment Funding Program 66	Be amended by striking out the words "is a brownfield, affordable housing or".	Critical needs analysis/ stakeholder consultation identified the need to strengthen the support of brownfield development and affordable housing construction.	Regional staff cannot accept the Committee's recommendation. The review of the SNIP has shown that this Program is important to developers involved in brownfield development and affordable housing construction.
Building and Façade Improvement Grant/Loan Program	Be amended by inserting the words "in the absence of Local Design Guidelines," between the words "or" and "Regional".	With respect to façade improvements, local municipalities that do have urban design guidelines in place have been defaulting to the Region's Model Urban Design Guidelines.	Regional staff accept the Committee's recommendations and the program's requirements are reflective of this.
Residential Grant/Loan Program	Be subject to review for the possibility of increasing the maximum grant per unit, implementing a sliding scale or removing the matching grant altogether	Critical needs analysis/ stakeholder consultation revealed that the current maximum funding level of a \$5,000 grant per unit was insufficient.	Regional staff support increasing the matching grant from \$5,000 to \$7,500 per unit. The continued introduction of new residential units is critical to downtown revitalization.
Heritage Restoration and Improvement Grant/Loan Program,	Be approved as presented.	Regional staff accept the Steering Committee's recommendation.	No change is required.
Environmental Site Assessment Program	Be approved as presented.	Regional staff accept the Steering Committee's recommendation.	No change is required.

Incentive Program	Smarter Niagara Steering Committee Recommendation	Regional Staff Reply	Regional Staff Recommendation
Public Domain Incentives Program	Be approved as presented.	Regional staff accept the Steering Committee's recommendation.	No change is required.
Grant Program for Affordable Housing	The new Grant Program for Affordable Housing be investigated by staff to determine their appropriateness to the <i>Smarter Niagara</i> Incentives Program and be redirected to other committees for implementation, if necessary.	Critical needs analysis/ stakeholder consultation clearly identified the need to support the construction of affordable housing.	The Committee's recommendation cannot be supported as the provision of affordable housing is an essential component to building a complete community.
Agricultural Feasibility Study Grant	The new Agricultural Feasibility Study Grant be investigated by staff to determine their appropriateness to the <i>Smarter Niagara</i> Incentives Program and be redirected to other committees for implementation, if necessary.	Critical needs analysis/ stakeholder consultation clearly identified the need to support studies that determine whether existing agricultural buildings can be converted/adapted to specialty in-demand agricultural or agri-tourism uses, as well as business plans for new agriculture and agriculture related uses.	The Committee's recommendation cannot be supported as these new incentives will address an identified program gap and strengthen the agricultural industry by promoting new agriculture, agriculture related and agri-tourism uses.
Agricultural Building and Facilities Revitalization Grant	The new Agricultural Building and Facilities Revitalization Grant be investigated by staff to determine their appropriateness to the <i>Smarter Niagara</i> Incentives Program and be redirected to other committees for implementation, if necessary.	Critical needs analysis/ stakeholder consultation clearly identified the need to support physical improvements to existing agricultural properties, buildings and facilities in order to support agriculture.	The Committee's recommendation cannot be supported as these new incentives will address an identified program gap and strengthen the agricultural industry by promoting farm building rehabilitation, new forms of agriculture and value added secondary production.

Review and Update of the Smarter Niagara Incentive Programs

Submitted To:



Submitted By



November 2011

EXECUTIVE SUMMARY

Background

The Smarter Niagara Incentive Programs are a comprehensive framework of financial incentive programs designed to promote Smart Growth in Niagara. These programs were endorsed by Regional Council in 2002 and efforts have been ongoing to implement the Smarter Niagara Incentive Programs since 2003. The Region has budgeted and disbursed significant funds for implementation of these programs. Numerous local municipalities in Niagara Region have taken advantage of funding from the Smarter Niagara Incentive Programs by adopting community improvement plans (CIPs) that contain complementary incentive programs.

The Smarter Niagara Incentive Programs currently include the following programs:

- 1) Reduction of Regional Development Charges;
- 2) Property Rehabilitation and Redevelopment Tax Increment Funding Program;
- 3) Building and Facade Improvement Grant/Loan Program;
- 4) Residential Grant/Loan Program;
- 5) Heritage Restoration and Improvement Grant/Loan Program;
- 6) Environmental Assessment Study Grant Program; and,
- 7) Public Domain Incentives Program.

The private sector has responded to these incentive programs by initiating dozens of residential, commercial and mixed use development and redevelopment projects in central urban areas and on brownfield sites.

Since introduction of the Smarter Niagara Incentive Programs in 2003, a number of factors have combined to suggest that a review and update of the programs is now in order. This includes:

- a) Adoption of Regional Policy Plan Amendment (ROPA) 2-2009 which implements the Region's Growth Management Strategy (Niagara 2031);
- b) Results of CIP programs and lessons learned in a number of municipalities such as St. Catharines and Niagara Falls that have had incentive programs in place for several years;
- c) Input from Local/ Regional staff and program users regarding the current programs; and,
- d) Evolving incentive program best practices, including the use of incentive programs that promote energy efficiency and sustainable planning and development.

The purpose of this report is to review the Smarter Niagara Incentive Programs and provide recommendations for the updating of these programs.

Methodology

The recommendations contained in this report were developed using a comprehensive methodology to review the existing Smarter Niagara Incentive Programs. This review included completion of the following tasks:

- a) A review of key Regional policy documents and reports to determine policy direction for the Smarter Niagara Incentive Programs;

Review and Update of the Smarter Niagara Incentive Programs

- b) A review of best practices used by other Ontario municipalities to promote the types of community improvement and economic development identified in the policy review;
- c) Review and quantitative analysis of the results of the Smarter Niagara Incentive Programs from 2003 until the end of 2009;
- d) Interviews with Regional staff , Local Municipal CIP Coordinators and other key stakeholders who have utilized or are affected by Local/Regional incentive programs;
- e) The identification of program gaps, possible improvements, administrative issues and future program needs and priorities for the Smarter Niagara Incentive Programs;
- f) Preparation of a Draft Preliminary Incentive Program Concepts Report;
- g) Presentation of the Draft Preliminary Incentive Program Concepts Report at a Stakeholder Consultation Session and Workshop on November 24, 2010 and review of comments received during and after the Stakeholder Consultation Session and Workshop;
- h) Preparation of Revised Preliminary Incentive Program Concepts and presentation of the these concepts at a public meeting held on March 23, 2011;
- i) Preparation of a Draft Report in September of 2011 and circulation and presentation of this Draft Report to the Local Municipal CIP Coordinators in October of 2011; and,
- j) Preparation of this Final Report.

In addition to the stakeholder consultation sessions and the public meeting noted above, project results and progress updates were presented to various committees during the process, including the Smarter Niagara Steering Committee.

Smarter Niagara Incentive Program Funding and Results

The Region has a long standing program of providing its local municipalities funding for the preparation of community improvement plans and by the end of 2010, the Region of Niagara had paid out or committed a total of \$603,500 for the preparation of local CIPs. In addition to the funding for preparation of CIPs, the Region has committed just under \$775,000 toward public realm improvement projects in five local municipalities, and an additional \$199,675 for advanced visualization projects in three local municipalities. In total, by the end of 2010, the Region had committed \$1,577,550 in funding for Local CIPs, public realm improvement projects and advanced visualization.

A total of 178 incentive program applications for private development were approved by the five municipalities in Niagara who were actively offering any incentive programs over the period 2003 to 2009. This includes 61 applications in St. Catharines, 59 in Niagara Falls, 36 in Niagara-on-the-Lake, 14 in Welland, and 8 in Thorold. Niagara Region assisted in the funding of these private developments by providing Smarter Niagara Incentive Program funding to the Local Municipalities for their approved incentive program applications. The number of municipalities in Niagara offering incentive programs through Local CIPs has now increased to ten, with several municipalities in Niagara recently adopting CIPs.

The total contribution from the Region to the funding of the 178 Local Municipal incentive program applications approved between 2003 and 2009 is estimated at \$3,210,818 and the total contribution from the Local Municipalities is estimated at \$4,005,440. A total of \$7,216,259 in Regional/Local Municipal funding was committed to the projects taking advantage of funding available through CIP programs, and this \$7,216,259 in Local/Regional funding will generate

Review and Update of the Smarter Niagara Incentive Programs

approximately \$65,909,672 in private sector construction investment and a total public/private investment of well over \$73,000,000 a result of the construction of the committed projects. This represents a healthy overall leverage ratio of approximately 9.1 times the Regional/Local investment.

Critical Needs

In order to determine critical needs for improvement to the Smarter Niagara Incentive Programs, interviews were conducted with Local CIP Coordinators, other Local Municipal staff, Regional staff, and key stakeholders from the development community. In total, 23 people were interviewed. The results of these interviews were augmented by the Background Policy Review and feedback received from the Smarter Niagara Steering Committee in order to identify the key critical needs for incentive program revisions and possible new programs.

Generally, those interviewed felt the existing Smarter Niagara Incentive Programs are both appropriate and effective. There was a strong desire to increase maximum incentive program amounts, including the Regional contribution, wherever possible so as to improve the applicability and effectiveness of the incentive programs. It was also noted that in order to spur more brownfield redevelopment projects, the difference in funding available between brownfield and non-brownfield projects needs to be greater.

While the current administration of the Smarter Niagara Incentive Programs was generally viewed as effective, a number of possible improvements were identified. Some Local Municipalities do not front-end the Region's share of grants and loans, including tax increment grants. This practice creates a time delay prior to the applicant receiving full payment of the grant or loan as compared to the practice of the Local Municipality front-ending the Region's share of the payment and then recovering this payment from the Region through a regular reimbursement (e.g., monthly or quarterly) accounting. The latter practice is how the Smarter Niagara Incentive Programs were originally designed to operate, and is seen as an improvement over the current two-step process employed by some Local Municipalities.

Another significant administrative improvement that was identified is to have a single staff person at the Regional level (a Smarter Niagara Incentive Programs Coordinator) responsible for coordinating and responding to local CIP program issues. It was felt that this would help to clarify and standardize program requirements and administrative procedures. The need for such a coordinator at the Regional level will likely increase as more municipalities implement their CIPs and therefore request Regional funding from the Smarter Niagara Incentive Programs.

The need for a separate program to promote the construction of affordable housing was identified as a program gap. Another program gap identified by both those interviewed and through the policy review is the need for incentives that promote more sustainable forms of urban development and healthy communities in order to help achieve the goals of the Regional Growth Management Strategy. This includes developments that incorporate LEED certified buildings and neighbourhoods, green buildings, higher densities, and better quality urban design. The promotion of farm building rehabilitation, new forms of agriculture and value added secondary production in agricultural areas was identified as a program gap. Financial support for cultural heritage, including the arts, was also identified as a program gap. However, because Section 28 of

Review and Update of the Smarter Niagara Incentive Programs

the *Planning Act* restricts grants and loans to community improvement activities that are property/building based, the ability to provide meaningful incentives to cultural heritage groups through a CIP is very limited. Finally, incentive programs to help attract development to the employment lands in the Niagara Gateway Economic Zone and Centre were identified as a future priority. These programs will be developed as part of the Niagara Gateway Economic Zone and Centre CIP. Therefore, these programs are not presented in this report.

Recommendations

The recommended revisions to the existing Smarter Niagara Incentive Programs and the recommended new programs to be added to the Smarter Niagara Incentive Programs are summarized in the table below. This table is followed by the administration, budget and other recommendations pertaining to the Smarter Niagara Incentive Programs.

Review and Update of the Smarter Niagara Incentive Programs

Summary of Recommended Smarter Niagara Incentive Program Revisions and New Programs

Reference Number	Program Name	Type of Program Change	Description
8.1.1	Regional Development Charge Reduction Program	Revision	<ul style="list-style-type: none"> a) Make brownfield sites that are being redeveloped for industrial use outside downtowns eligible. b) Develop clearer and more complete Smart Growth Design Criteria. c) If project is on a brownfield and in central urban area, provide automatic 75% reduction in Regional development charges instead of 50%.
8.1.2	Property Rehabilitation and Redevelopment Tax Increment Funding Program	Revision	<ul style="list-style-type: none"> a) Region will continue to match local percentage tax increment grant, but if project is brownfield redevelopment, affordable housing or conforms to Region's Smart Growth Design Criteria, Region will provide minimum 75% tax increment grant.
8.1.3	Building and Façade Improvement Grant/Loan	Revision	<ul style="list-style-type: none"> a) Clarify that Regional grant/loan applies to both façade and building improvement and full amount available for either type. b) Increase matching grant/loan from Region for front façade improvement and/or building improvement from \$5,000 to \$10,000. c) Introduce a matching grant/loan from Region for side and/or rear façade improvement of up to \$10,000. d) Require that all façade improvements conform to Local Municipal urban design guidelines or the Region's Model Urban Design Guidelines.
8.1.4	Residential Grant/Loan Program	Revision	<ul style="list-style-type: none"> a) Increase matching grant from Region from \$5,000 per unit to \$7,500 per unit.
8.1.5	Heritage Restoration and Improvement Grant/Loan	Revision	<ul style="list-style-type: none"> a) Increase matching grant/loan from Region for designated residential properties from \$2,500 to \$5,000 and from \$10,000 to \$15,000 for designated commercial/ industrial properties. b) Add properties that included within boundary of heritage conservation district designated under Part V of the Ontario Heritage Act as eligible.
8.1.6	Public Domain Incentives Program	Revision	<ul style="list-style-type: none"> a) Evaluate applications using Region's new Smart Growth Design Criteria.

Review and Update of the Smarter Niagara Incentive Programs

Summary of Recommended Smarter Niagara Incentive Program Revisions and New Programs (Cont'd)

8.2.1	Affordable Housing Grant/Loan Program	New	Program provides matching Regional grant/loan for construction of new or renovation of existing residential units for affordable housing. Matching contribution from Local Municipality required with maximum Regional grant/loan of \$7,500 per unit and maximum of 20 units per property. This grant/loan would be available in addition to the existing Residential Grant/Loan.
8.2.2	Agricultural Feasibility Study Grant	New	Program provides matching Regional grant for studies that determine if existing agricultural/rural buildings and facilities can be converted or adapted to specialty in-demand agricultural or agri-tourism uses, as well as business plans for new agriculture and agriculture related uses. Matching contribution from Local Municipality required with maximum Regional grant of \$7,500.
8.2.3	Agricultural Buildings and Facilities Revitalization Grant	New	Program provides matching tax increment based grant for up to ten (10) years for physical improvements to existing agricultural properties, buildings and facilities that promote farm building rehabilitation, conversion to bio-fuels, new forms of agriculture, and value added secondary production in agricultural areas.
8.2.4	Direct Funding for Cultural Heritage and Arts Projects and Programs	NA	It is recommended that the program and other needs of cultural heritage groups be directly addressed through a separate Funding Program for Cultural Heritage and Arts Projects that falls outside the auspices of a CIP program.

Review and Update of the Smarter Niagara Incentive Programs

Administration Recommendations

CIP Contacts Group

It is recommended that the CIP Contacts Group being meeting again on a regular basis (3 to 4 times per year) and that Regional staff coordinate these meetings, take meeting notes, and disseminate these notes to all members of the CIP Contacts Group.

Smarter Niagara Incentive Programs Coordinator

It is recommended that the Region establish an Incentive Programs Coordinator position and that this position be responsible for a number of roles, including but not necessarily limited to:

- a) acting as a liaison between Local Municipal CIP coordinators staff and Regional planning, finance, legal and other staff with regards to the administration of the Smarter Niagara Incentive Programs;
- b) receiving, processing and administering requests for matching Regional program assistance from the Local Municipalities;
- c) planning and coordinating meetings of the CIP Contacts Group, including the dissemination of meeting notes and required follow-up;
- d) marketing the Smarter Niagara Incentive Programs to property owners, developers, and others both within and outside the Region;
- e) monitoring Smarter Niagara Incentive Program spending and results and reporting these results to Regional Council on a regular basis;
- f) liaising with Local Municipal CIP coordinators to obtain monitoring data, and ensure this data is collected and organized in a consistent and standardized manner;
- g) developing revisions to the Smarter Niagara Incentive Programs based on monitoring results and ongoing input from the Local Municipal CIP coordinators and other key stakeholders; and,
- h) acting as a project expeditor in relation to project issues involving the Smart Growth Incentive Programs.

It is recommended that the Incentive Programs Coordinator position be a full-time position and that one Regional staff person be dedicated solely to the responsibilities outlined above.

Incentive Program Monitoring and Reporting

It is recommended that the:

- a) Region in consultation with Local Municipalities develop a standardized framework for monitoring and reporting incentive program funding (inputs) and economic and other impacts (outputs);
- b) Incentive Programs Coordinator be responsible for assisting in the development of this standardized incentive programs monitoring and reporting framework; and,
- c) Incentive Programs Coordinator would be responsible for assembling data from Regional departments and the Local Municipalities and providing an annual report and updates (as required) regarding progress on implementation of the Smarter Niagara Incentive Programs to the Smarter Niagara Steering Committee and Regional Council.

Review and Update of the Smarter Niagara Incentive Programs

Financial Administration

It is recommended that the Smarter Niagara Incentive Programs be financially administered as originally intended, i.e., with Local Municipalities front-ending the Region's share of any approved incentive program payment, and the Region then reimbursing the Local Municipality on a regular basis.

Budget Recommendations

It is recommended that:

- a) a portion of the total annual budget for the Smarter Niagara Incentive Programs be dedicated to the Public Domain Incentives Program;
- b) advanced visualization exercises no longer be funded from the Smarter Niagara Incentive Programs budget; and,
- c) Local Municipal plans and planning exercises/work other than Local Municipal CIPs not be funded from the Smarter Niagara Incentive Programs budget.

It is recommended that if the Region approves the recommended increase in Regional funding levels for the existing Smarter Niagara Incentive Programs and the new programs recommended in this report, then the Region should increase the annual budget amount allocated to the Smarter Niagara Incentive Programs.

Other Recommendations

Marketing of the Smarter Niagara Incentive Programs

Once the Smarter Niagara Incentive Programs have been revised, it is recommended that the Region, led by the Incentive Programs Coordinator:

- a) prepare a Primer on the Smarter Niagara Incentive Programs that describes the available programs and how they integrate with locally available CIP incentive programs, including general information on program eligibility, application and administration procedures;
- b) Enhance the marketing of the Smarter Niagara Incentive Programs including:
 - i) presentations to development industry representatives and their support professionals (planners, engineers, architects, real estate professionals, financial institutions, lawyers, accountants, environmental consultants, etc...);
 - ii) a semi-annual newsletter containing profiles of successful projects across the Region that have utilized the Smarter Niagara Incentive Programs;
 - iii) preparation and updating of marketing materials such as brochures and/or pamphlets that provide summary information on the Smarter Niagara Incentive Programs and accompany the Primer on the Smarter Niagara Incentive Programs;
 - iv) enhancement of the Region's web page via addition of direct (one-click) access to information on the Smarter Niagara Incentive Programs, the aforementioned newsletter and marketing materials, and direct links to the Local Municipal CIP program and application materials.

Review and Update of the Smarter Niagara Incentive Programs

Agricultural CIP(s)

It is recommended that prior to developing and implementing the new programs recommended in this report to promote new forms of agriculture and value added secondary production in agricultural areas, the Region discuss the issue of agricultural incentives with local municipalities to determine their level of interest and ability/willingness to fund these programs in partnership with the Region.

Depending on the response from the local municipalities, it is then recommended that the Region in consultation with interested local municipalities consider preparation and adoption of a “Master Agriculture CIP” or individual Local Agriculture CIPs that local municipalities in Niagara can adopt to promote agriculture and that contain at a minimum the incentive programs recommended in Sections 8.2.2 and 8.2.3 of this report.

Provincial Participation in the Smarter Niagara Incentive Programs

It is recommended that the Province cost share with the Region and its Local Municipalities in the Smarter Niagara Incentive Programs because these programs clearly help achieve Provincial policies such as the Places to Grow Growth Plan for the Greater Golden Horseshoe.

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Review and Update of the Smarter Niagara Incentive Programs

1.0 INTRODUCTION

1.1 Background

The Smarter Niagara Incentive Programs were endorsed by Regional Council in 2002. The primary purpose of this comprehensive framework of financial incentive programs has been to promote Smart Growth in Niagara, with the geographic focus of the programs on promoting redevelopment of urban areas. More specifically, the Smarter Niagara Incentive Programs were designed to promote and encourage:

- Brownfield Redevelopment;
- Downtown and Commercial Area Revitalization and Redevelopment;
- Residential Conversion and Intensification; and,
- Heritage Restoration and Improvement.

The Smarter Niagara Incentive Programs currently include the following programs:

- 1) Reduction of Regional Development Charges;
- 2) Property Rehabilitation and Redevelopment Tax Increment Funding Program;
- 3) Building and Facade Improvement Grant/Loan Program;
- 4) Residential Grant/Loan Program;
- 5) Heritage Restoration and Improvement Grant/Loan Program;
- 6) Environmental Assessment Study Grant Program; and,
- 7) Public Domain Incentives Program.

The Smarter Niagara Incentive Programs are summarized in **Table 1** below and a description of each program is provided in **Appendix A**.

Efforts have been ongoing to implement the Smarter Niagara Incentive Programs since 2003 and the Region has budgeted and disbursed significant funds for implementation of these programs. Numerous local municipalities in the Niagara Region have taken advantage of funding from the Smarter Niagara Incentive Programs by adopting community improvement plans (CIPs) that contain complementary incentive programs. The private sector has responded to these incentive programs by initiating dozens of residential, commercial and mixed use development and redevelopment projects in central urban areas and on brownfield sites. This has served to maximize the utilization of hard services already in place as opposed to having to extend and pay for hard services to new greenfield areas. The Smarter Niagara Incentive Programs have served for several years as a model of partnership between local municipalities in Niagara and Niagara Region to promote urban area revitalization and Smart Growth.

Since introduction of the Smarter Niagara Incentive Programs in 2003, a number of factors have combined to suggest that a review and update of the programs is now in order. This includes:

- a) Adoption of Regional Policy Plan Amendment (ROPA) 2-2009;
- b) Completion of the Niagara Gateway and Economic Zone and Centre Final Report in December of 2008.
- c) Results of CIP programs and lessons learned in a number of municipalities such as St. Catharines and Niagara Falls that have had incentive programs in place for several years;

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Table 1 Current Smarter Niagara Incentive Programs

	Program Name¹	Purpose	Details
1	Reduction of Regional Development Charges	To promote development, redevelopment and intensification of residential, commercial and institutional uses.	The Region offers a reduction of 50% of the Regional Development Charge (DC) for residential, commercial or institutional development or conversion of existing buildings to these uses. An additional 50% Regional DC reduction is available to developments that include at least 3 of the Region's 5 Smart Growth Design Criteria (see Appendix B for the Region's Smart Growth Design Criteria).
2	Property Rehabilitation and Redevelopment Tax Increment Funding Program	To stimulate building and property rehabilitation or redevelopment.	The Region will match the percentage and duration of the tax increment generated by a rehabilitation or redevelopment project that is paid by the municipality in the form of a grant to the applicant.
3	Building and Facade Improvement Grant/Loan Program	To promote structural improvement of buildings and/or improvement of building facades.	The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per property, or a matching loan from the Region of \$10,000 per property.
4	Residential Grant/Loan Program	To promote residential conversion, infill and intensification.	The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per unit, or a matching loan from the Region of \$10,000 per unit. Maximum of 20 units per property for a grant or loan.
5	Heritage Restoration and Improvement Grant/Loan Program	To promote restoration and improvement of buildings designated under the Ontario Heritage Act.	The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant or loan from the Region of \$2,500 per residential property and \$10,000 per commercial or industrial property.
6	Environmental Assessment Study Grant Program	To promote undertaking of environmental site assessments.	The Region will provide a matching grant on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per study to promote the completion of Phase II Environmental Site Assessments, Remedial Action Plans and Risk Assessments, and a maximum of two studies per property.
7	Public Domain Incentives Program	To support public realm improvements that are identified in or in compliance with municipal planning documents	The Region will provide a matching grant on a cost shared basis with the local municipality to a maximum grant from the Region of \$100,000 per project to support public realm improvements

¹ Programs 1 to 6 apply only in central urban areas and to brownfields within the urban area.

Review and Update of the Smarter Niagara Incentive Programs

- d) Input from Local/ Regional staff and program users regarding the current programs; and,
- e) Evolving incentive program best practices, including the use of incentive programs that promote energy efficiency and sustainable planning and development

Regional Policy Plan Amendment (ROPA) 2-2009 was approved by Regional Council on May 28, 2009. This amendment implements the Region's Growth Management Strategy (Niagara 2031) and brings the Region into conformity with the Places to Grow Growth Plan for the Greater Golden Horseshoe and the Provincial Policy Statement (PPS). As such, ROPA 2-2009 puts a high priority on intensification (both residential and employment), mixed, compact and transit supportive land uses and development, densification of suburbs, nodes and corridors, and complete communities.

1.2 Purpose

The purpose of this report is to review the Smarter Niagara Incentive Programs and provide recommendations for the updating of these programs. More specifically, this report addresses the following questions:

- 1) Which Smarter Niagara Incentive Programs have been most utilized to date?
- 2) What is the feedback on the Smarter Niagara Incentive Programs from the local municipalities and applicants for CIP incentive programs in those local municipalities?
- 3) What critical community improvement needs (gaps) are not being addressed by the existing Smarter Niagara Incentive Programs?
- 4) What are the progressive best practices in other municipalities that could be considered for adoption into the Smarter Niagara Incentive Programs?
- 5) How should the Smarter Niagara Incentive Programs be revised and/or augmented to help address any critical gaps not currently addressed by the programs?
- 6) How should the Smarter Niagara Incentive Programs be revised and/or augmented to help accomplish the growth management objectives in ROPA 2-2009 and the strategic directions in the Niagara Growth Management Strategy (Niagara 2031)?
- 7) What are the details of the revised and any new incentive programs recommended in response to questions 5) and 6) above?

Another important question is: what incentive programs could be developed and implemented to help accomplish the goals of the Niagara Gateway and Economic Zone and Centre Final Report? The answer to this question is addressed separately in the Niagara Gateway Economic Zone and Centre Community Improvement Plan (CIP) (report to be prepared). As such, the review of the Niagara Gateway and Economic Zone and Centre Final Report prepared in December of 2008, best practices used in other municipalities to promote development of employment lands, and the incentive programs that could be used in Niagara to promote development of employment lands in the Niagara Gateway and Economic Zone and Centre are contained in report(s) to be prepared for the Niagara Gateway Economic Zone and Centre CIP.

Review and Update of the Smarter Niagara Incentive Programs

1.3 Methodology

A number of sequential tasks have been undertaken in order to review the existing Smarter Niagara Incentive Programs and develop the recommendations contained in this report. These tasks included:

- a) A Background Policy Review of key Regional policy documents and reports, including ROPA 2-2009, to determine policy direction for the Smarter Niagara Incentive Programs;
- b) A review of best practices used by other upper tier and lower tier Ontario municipalities to promote the types of community improvement, development and economic development goals identified in the Background Policy Review;
- c) Review and quantitative analysis of Smarter Niagara Incentive Program Monitoring Reports from 2003 until 2009 and CIP program monitoring reports produced by the Local Municipalities in Niagara up to the end of 2009;
- d) Interviews with Regional staff responsible for key policy areas;
- e) Interviews with Local Municipal CIP Coordinators in Niagara;
- f) Interviews with Key Local Stakeholders in Niagara who have utilized or are affected by Local/Regional incentive programs;
- g) Based on the results of tasks a) to f) above, the identification of program gaps, possible improvements, administrative issues and future program needs and priorities for the Smarter Niagara Incentive Programs;
- h) Preparation of a Draft Preliminary Incentive Program Concepts Report in November of 2010 which was presented to key stakeholders at a Stakeholder Consultation Session and Workshop on November 24, 2010;
- i) Review of comments received from key stakeholders during and after the Stakeholder Consultation Session and Workshop;
- j) Preparation of Revised Preliminary Incentive Program Concepts based on the review of comments received during and after the Stakeholder Consultation Session;
- k) Presentation of the Revised Preliminary Incentive Program Concepts at a public meeting held on March 23, 2011 and review of comments received after the public meeting;
- l) Preparation of Incentive Program Recommendations and presentation of these recommendations to the Smarter Niagara Steering Committee in July of 2011;
- m) Preparation of the Draft Review and Update of the Smarter Niagara Incentive Programs Report in September of 2011;
- n) Presentation of the Draft Report to the Local Municipal CIP Coordinators in October of 2011 and review of the CIP Coordinators comments; and,
- o) Preparation of this Final Report.

In addition to the stakeholder consultation session and public meeting noted above, project results and progress updates were presented to various committees during the process including the:

- Community Improvement Plan (CIP) Contacts Group (April 14, 2010; May 12, 2010);
- Smarter Niagara Steering Committee (May 19, 2010, July 7, 2010; September 9, 2010; July 13, 2011);
- Niagara Culture Committee (August 30, 2010);
- Niagara Agricultural Task Force Meeting (February 4, 2011);

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- Niagara Gateway Economic Zone and Centre Committee (April 23, 2010; September 17, 2010; March 25, 2011).

1.4 Report Content

This report is divided into eight sections.

Section 2.0 of the report presents the review of key Regional policies that helped to guide and direct the updating of the Smarter Niagara Incentive Programs.

Section 3.0 contains a best practices review of Smart Growth incentive programs used by other upper and lower tier municipalities in Ontario.

Section 4.0 describes the funding and results of the existing Smarter Niagara Incentive Programs.

Section 5.0 describes the critical needs for improvement to the Smarter Niagara Incentive Programs.

Section 6.0 presents the preliminary incentive program concepts that were developed for the Smarter Niagara Incentive Programs.

Section 7.0 provides a summary of the stakeholder and public consultation that took place on the preliminary incentive program concepts.

Finally, Section 8.0 of the report contains recommendations with respect to revisions to the existing Smarter Niagara Incentive Programs, addition of new programs, administration, budgeting and other recommendations, all designed to improve the effectiveness of the Smarter Niagara Incentive Programs.

2.0 BACKGROUND POLICY REVIEW

The following Regional policy documents and reports were reviewed to determine key policy directions in relation to the Smarter Niagara Incentive Programs:

- Niagara Growth Management Strategy (Niagara 2031);
- Regional Policy Plan Amendment (ROPA) 2-2009 and related staff reports;
- Regional Policy Plan Amendment (ROPA) 6-2009;
- Navigating Our Future: Niagara's Economic Growth Strategy (2009-2012);
- 2007-2011 Council Business Plan;
- Development Charges By-law No. 62-2009;
- Region of Niagara Discussion Paper RE: The Financing of Growth-Related Infrastructure (March 2010);
- Niagara Gateway and Economic Zone and Centre Final Report (December 2008);
- Culture Plan (March 2010); and,
- Local Food Action Plan (December 2008).

Regional staff responsible for key policy areas in relation to the above-noted policies, plans and reports were also interviewed. Finally, members of the Smarter Niagara Steering Committee also provided comments on key Regional policy objectives when presented with project updates.

Section 2.1 below briefly describes the key policies in the above-noted policy documents, strategies, plans and reports that provide direction for the updating of the Smarter Niagara Incentive Programs, while Section 2.2 summarizes the key policy directions that were used to help guide the updating of the Smarter Niagara Incentive Programs.

2.1 Key Regional Policies

2.2.1 Regional Policy Plan Amendment (ROPA) 2-2009 and the Niagara Growth Management Strategy (Niagara 2031)

Regional Policy Plan Amendment 2-2009 to the Official Plan for the Niagara Planning Area was approved by Regional Council on May 28, 2009. This amendment implements the Region's Growth Management Strategy (Niagara 2031) and brings the Region into conformity with the Places to Grow Growth Plan for the Greater Golden Horseshoe and the Provincial Policy Statement (PPS). Therefore, ROPA 2-2009 is the key Regional policy document with respect to providing policy guidance to the updating of the Smarter Niagara Incentive Programs.

The Sustainable Urban Vision in Section 2 of ROPA 2-2009 supports intensification, mixed uses, compact and transit supportive development and complete communities. Section 5.3 of ROPA 2-2009 goes on to introduce Sustainable Urban Development policies. In this section, the Region encourages local municipalities to establish official plan policies and other measures that support environmental sustainability. These principles include reducing energy demand, maximizing water conservation, sustainable stormwater management practices, and integrating active transportation and transit into development plans. The Region will assist and support local municipalities in developing such policies and measures to implement them.

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Section 4.3.2 of ROPA 2-2009 identifies the primary goal in locally designated intensification areas as residential intensification, supported by employment and other uses and identifies community improvement plans as one of the tools to facilitate growth and development within local municipally designated intensification areas. Downtown St. Catharines is identified as an Urban Growth Centre. Consistent with the Places to Grow Plan, the Downtown St. Catharines Urban Growth Centre will be planned as a focal area for a mix of land uses that accommodates high density residential and employment development.

The Regional Policy Plan also supports opportunities for affordable housing (not-for-profit and private) and encourages local municipalities to provide incentives for affordable housing. Furthermore, the Region encourages affordable housing on brownfields and in downtown areas through the use by developers of incentives provided by the Region and local municipalities. The Regional Policy Plan states that the Region will investigate establishing an Affordable Housing Reserve Fund to provide incentives to private and community organizations for the creation of affordable housing.

Section 5.10 encourages support for the conservation, restoration, enhancement and adaptive reuse of cultural heritage resources.

Section 3.2 identifies the Niagara Economic Gateway as a key component of the Region's urban structure. Section 8 of ROPA 2-2009 contains policies for the Niagara Economic Gateway Zone and Centre in Niagara Falls, Fort Erie, Thorold, Welland and Port Colborne. The overall objective for the Niagara Economic Gateway is the creation of a high quality community that is sustainable. Creating vibrant downtowns is also a key objective of the Gateway policies in the Official Plan. Section 8.8 contains the policies for the employment lands within the Niagara Economic Gateway. This policy specifies that the Region will work in partnership with the Province and local municipalities to create an attractive investment climate for the employment lands through a number of measures, including improving infrastructure, reducing the cost of servicing these lands, and exploring opportunities for developing environmentally sustainable buildings.

2.2.2 Regional Policy Plan Amendment (ROPA) 6-2009

Regional Policy Plan Amendment 6-2009 was approved by Regional Council in April of 2010 and came into full force and effect in May of 2011. ROPA 6-2009 introduced agricultural value-added activities policies into the Regional Official Plan. These policies recognize the changing nature of agriculture and support farm diversification uses that contribute to the long term economic sustainability of the agricultural industry in Niagara. Therefore, ROPA 6-2009 permits agricultural related value added and secondary uses that complement farming activities and provide for increasing the economic value of an agricultural product or use.

2.2.3 Niagara's Economic Growth Strategy

The Region's Economic Growth Strategy was initiated by Regional Council and developed under the leadership of the Niagara Economic Development Corporation. This Strategy presents six strategic action plans to foster economic growth in Niagara. The strategic action plan most relevant to the Smarter Niagara Incentives Program is the creation of a competitive business

Review and Update of the Smarter Niagara Incentive Programs

environment in Section 2.0 of the Strategy. Section 2.2 of the Strategy recommends that the Region implement a full range of Smart Growth and brownfield redevelopment initiatives including community improvement plans and incentive programs. Section 3.0 of the Strategy identifies a set of priority growth sectors that the Region should focus on.

2.2.4 Council Business Plan

The 2007-2011 Council Business Plan² is a very high level plan. This plan focuses on community and social well-being (including affordable housing), economic prosperity, environmental sustainability (energy, climate, waste, and brownfield redevelopment) and alternative forms of transportation.

2.2.5 Culture Plan

The Culture Plan was approved by Regional Council in March of 2010. The purpose of this plan is to create the overarching policy and planning framework including strategic directions and actions to guide Niagara's support for the creative economy and development of the creative cultural sector. The focus of the Plan is on creative places through the preservation and enhancement of cultural assets, art in public places, and promoting cultural destinations such as downtowns. To this end, Action 1.2 in the Culture Plan recommends the development of a Niagara investment strategy and incentives for cultural development, including loans and tax incentives to promote cultural development. The Plan encourages the inclusion of art in public places and facilitates public art programs in Niagara.

The Region had a Pilot Public Art Grant Program that committed funding to only two projects, the GO/Metrolinx Station at Casablanca Boulevard in Grimsby, and the fountain in the Historic Drummondville Community Improvement Project Area. The Region's Pilot Public Art Grant Program has been discontinued.

2.2.6 Local Food Action Plan

Niagara's Local Food Action Plan was approved by Regional Council in December of 2008. This Plan outlines actions that will help Niagara's food industry grow. Action 4E in the plan recommends that the Region develop, offer and promote financial programs to encourage the production, processing and distribution of local food in Niagara. This includes:

- Revision of property tax policies and the introduction of tax incentives or development incentives to offset initial costs of infrastructure based on job creation or to promote green initiatives;
- Low interest rate loans; and
- Application fee reductions.

² At the time of writing, Regional Council is in the process of updating this plan.

2.2 Key Policy Directions

The review of key Regional policy documents, interviews with Regional staff responsible for key policy areas, and input from the Smarter Niagara Steering Committee identified a number of key policy directions that were utilized to help guide the updating of the Smarter Niagara Incentive Programs. These key policy directions include:

- a) Creating vibrant downtowns;
- b) Supporting brownfield redevelopment;
- c) Promoting residential intensification supported by employment and other uses in locally designated intensification areas;
- d) Supporting opportunities for affordable housing (not-for-profit and private), especially in downtowns and on brownfields;
- e) Investigating the establishment of an Affordable Housing Reserve Fund to provide incentives to private and community organizations for creation of affordable housing;
- f) Encouraging conservation, restoration, enhancement and adaptive reuse of cultural heritage resources;
- g) Encouraging the inclusion and maintenance of art in public places;
- h) Promoting diverse, walkable neighbourhoods;
- i) Encouraging production, process and distribution of local food in Niagara;
- j) Promoting and supporting sustainable urban development that:
 - i) Reduces energy demands/consumption;
 - ii) Integrates green roofs;
 - iii) Maximizes water conservation;
 - iv) Uses sustainable stormwater management practices;
 - v) Is of a high quality urban design; and,
 - vi) Is compact and transit supportive
- k) Reducing the cost of servicing land and developing environmentally sustainable industrial buildings in the Niagara Gateway Economic Zone and Centre.

The Regional policy documents reviewed also contain numerous mentions of the Region assisting and supporting local municipalities in providing programs and policies through a partnership model.

3.0 BEST PRACTICES IN OTHER MUNICIPALITIES

A best practices review of Smart Growth incentive programs used by other upper and lower tier municipalities in Ontario was conducted. This best practices review confirmed that Niagara Region is a leader in the innovative use of incentive programs that incorporate Smart Growth principles, including its Development Charge Reduction Program and its Public Domain Incentives Program. Niagara Region is also still the upper tier leader in the provision of incentive programs to lower tier municipalities. In fact, a number of other upper tier municipalities such as the Region of Waterloo and the Region of Durham have adopted a number of programs similar to the Smarter Niagara Incentive Programs as a way to partner with their lower tier municipalities in providing grants and loans for their lower tier CIPs.

A few single tier or upper tier municipalities have adopted incentive programs that incorporate innovative practices and/or Smart Growth concepts. The key aspects of these programs are highlighted below. These programs were reviewed to determine their potential ability to achieve the key policy directions identified for Niagara via adaptation into the Smarter Niagara Incentive Programs. Some of these innovative incentive program concepts, i.e., those which could help to achieve key policy directions for Niagara and address gaps identified in the Smarter Niagara Incentive Programs, were adapted and included in the Draft Preliminary Incentive Program Concepts Report produced in November of 2010.

3.1 Region of Waterloo

To date, the Region of Waterloo is the only municipality to adopt an upper tier CIP in Ontario. Known as the Waterloo Reurbanization CIP, this CIP was adopted in 2008 to focus new residential and non-residential development into the Central Transit Corridor between Cambridge, Kitchener and Waterloo which is the location of a future rapid transit system. While not offering any incentive programs, the CIP does authorize the Region of Waterloo to purchase and prepare lands within the corridor.

The Region of Waterloo has emulated Region of Niagara's programs for brownfield redevelopment including a development charge reduction programs, a joint tax increment based grant with participating local municipalities, and an environmental site assessment grant. The Region of Waterloo has added an allowance of 10% for indirect remediation costs to its tax increment based grant program, and an allowance of 20% for indirect remediation costs to its development charge reduction program.

3.2 City of Hamilton

In 2008, the City of Hamilton adopted the Hamilton LEEDING Way CIP which introduced a tax increment based grant program designed exclusively to promote development to Leadership in Energy and Environmental Design (LEED) standards. This program originally applied to the City's business parks and industrial areas. However, in 2010, this tax increment based grant program was expanded to apply to industrial/commercial, mixed use and multi-unit residential development across the entire urban area. The program provides a grant equal to 75% of the tax increment generated by a LEED certified project for up to 5 years and includes the costs of LEED energy modeling, construction and certification as eligible costs.

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In 2010, the City of Hamilton also introduced a brownfield remediation loan program in its downtown area via amendment to its Environmental Remediation and Site Enhancement (ERASE) CIP. This program originally offered a loan for up to 75% of the remediation costs on downtown developments at 1% below prime rate. The maximum loan available was \$100,000 and the developer repays the loan to the City through the tax increment grant normally retained by the developer. The maximum loan amount under this program was recently increased to \$400,000.

3.3 Town of The Blue Mountains

The Town of the Blue Mountains recently adopted a Comprehensive CIP for its three commercial core areas. This CIP contains a number of incentive programs designed to promote sustainable forms of development, including:

- A Commercial Building Improvement Loan Program that forgives 30% of the loan amount if the project achieves any level of LEED certification; and,
- A Revitalization Tax Increment Grant Program that increases the tax increment grant from 60% to 100% for projects that achieve LEED certification or conform to the Town's Sustainable Design Guidelines.

The CIP project also included the development of detailed Sustainable Design Guidelines for the Town. These Guidelines apply to both public and private developments and provide guidance with respect to:

- i) site infrastructure;
- ii) environmental preservation and enhancement;
- iii) water use and wastewater;
- iv) energy efficient building design and operation;
- v) material impacts;
- vi) plantings;
- vii) transportation and accessibility.

In addition, Design Guidelines were also prepared for infill development, façade improvement, streetscapes, and greenfield development.

3.4 Town of Caledon

The Town of Caledon offers a development charge reduction for commercial and industrial buildings that incorporate green technologies or achieve LEED certification. The maximum reduction of development charges is 27.5% for a building that achieves LEED platinum certification.

3.5 Town of Halton Hills

The Town of Halton Hills recently adopted a CIP containing a number of incentive programs designed to promote community improvement in agricultural areas. This includes grants for agricultural feasibility studies, as well as tax increment based grants and loans for the revitalization and improvement of agricultural buildings, facilities and lands.

3.6 Other Programs

Several other programs were reviewed including programs in the Region of Durham and several local municipalities across Ontario. One program that stood out as an innovative way to promote more affordable housing is the privately run Options for Homes Program. Options for Homes is a company that has built affordable housing developments in a number of GTA municipalities since 1993. They build no-frills projects with no marketing campaigns or real estate commissions. They also rely on local municipalities to defer development charges and other fees. These deferred development charges and fees are then registered as a second mortgage against the property and are paid off only when the house is sold or after a set period of time. This approach results in more affordable housing and helps to prevent speculation on the residential units being built.

4.0 EXISTING SMARTER NIAGARA INCENTIVE PROGRAMS

4.1 Historical Revisions to the Smarter Niagara Incentive Programs

While most of the current Smarter Niagara Incentive Programs were introduced in 2003, a number of the programs have been revised since 2003 and some new programs have been added. This section of the report provides an overview of these program revisions and additions as determined through a review of various Regional reports on the Smarter Niagara Incentive Programs.

In 2005, Report DPD 149-2005 clarified that the Region would provide a matching proportional share to the local municipality for local tax increment grant and tax assistance programs. This principle has been a major tenant of tax increment based grant programs. Report DPD 149-2005 also required that an annual report be prepared showing the disposition of funds through local CIP programs and the Smarter Niagara Incentive Programs. Finally, Report DPD 149-2005 directed the CIP Contacts Group investigate options for provision of low interest loans to not-for-profit housing agencies.

In 2007, Reports DPD 8-2007 and DPD 119-2007 introduced revisions to the existing programs and a new program. The maximum grant from the Region under the Residential Grant/Loan program was increased from \$2,500 to \$5,000 per unit. The maximum building and façade improvement grant from the Region was increased from \$2,500 to \$5,000. The Region also introduced a new program known as the Public Domain Incentives Grant Program. This program provides for matching of up to \$100,000 for local public realm improvement projects. Applications from local municipalities are vetted through the Regional Incentive Programs Review Team. The eligibility, funding and administration guidelines for the Public Domain Incentives Grant Program can be found in Report DPD 42-2008.

In July of 2009, the Region passed a new Development Charges By-law (62-2009). The new Development Charges By-law changed the Region's Development Charge Reduction Program for central urban areas and brownfields from 75% plus 25% for projects that achieve at least three of the five Smart Growth design criteria to 50% plus 50% for projects that achieve at least three of the five Smart Growth design criteria. The rationale for this change was suggested by the Smarter Niagara Steering Committee in an attempt to increase the number of projects in central urban areas and on brownfields that incorporate Smart Growth design criteria. Also, the Development Charges By-law does not allow a development charge reduction for a brownfield site that is rehabilitated for industrial use.

4.2 Local Community Improvement Plans in Niagara




As shown in **Table 2**, 10 of the 12 Local Municipalities in Niagara have adopted a total of 19 CIPs. Two more CIPs are currently being prepared. Seventeen of the 19 adopted CIPs have now been implemented, which is defined in Table 2 as there being at least one incentive program in the CIP available. The Town of Niagara-on-the-Lake (NOTL) has also adopted and implemented a heritage restoration and improvement grant program under Section 39 of the Ontario Heritage Act. Therefore, in total, 10 of the 12 municipalities in Niagara currently offer at least one incentive program. However, until the end of 2009, only 5 of these 9 municipalities

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(St. Catharines, Niagara Falls, Welland, Thorold and NOTL) were actively offering any incentive programs. The other four municipalities have only more recently begun to offer incentive programs.

Table 2 Local Community Improvement Plans in Niagara

Municipality	Type of CIP				
	Downtown/ CBD	Other Commercial Area	Brownfield	Comprehensive/ Multi-Area/ Waterfront	Site Specific
Fort Erie	✓		✓		
Grimsby	✓				
Lincoln	✗				
Niagara Falls	✓	✓	✓		
Niagara-on-the-Lake					✓
Pelham	✓				
Port Colborne	✓	✓	✓	✗	
St. Catharines				✓	
Thorold	✓	✓			✓
Wainfleet					
Welland	✓		✓		
West Lincoln	✓		✓		
TOTAL	9	3	5	2	2

-  = Adopted and implemented
 = Adopted/ to be implemented
 = In preparation

4.3 Smarter Niagara Incentive Program Funding and Results

4.3.1 Region to Local Funding for Preparation of CIPs, Public Domain Improvement Projects and Advanced Visualization

CIP and incentive program monitoring reports from both the Local Municipalities and the Region were reviewed and analyzed to determine program uptake, revisions, and results. The Local CIP coordinators and Regional staff augmented the data available in the monitoring reports with additional data that allowed a more fulsome review of the results of the partnerships of local and regional programs.

The Region has a long standing program of providing its local municipalities funding for the preparation of community improvement plans. **Table 3** shows the amount of funding provided by the Region to Local Municipalities in Niagara between 2003 and 2010 for the purposes of preparing CIPs, public realm improvement projects under the Public Domain Incentive Program, and for advanced visualization. By the end of 2010, the Region of Niagara had paid out or committed a total of \$603,500 for the preparation of local CIPs. No other upper tier municipality in Ontario has shown this level of financial commitment to assisting lower tier municipalities in

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the preparation of CIPs. In addition to the funding for preparation of CIPs, the Region has committed just under \$775,000 toward public realm improvement projects in five local municipalities, and an additional \$199,675 for advanced visualization projects in three local municipalities. In total, by the end of 2010, the Region had committed \$1,577,550 in funding for Local CIPs, public realm improvement projects and advanced visualization.

Table 3 Region to Local Funding for Preparation of CIPs, Public Domain Improvement Projects and Advanced Visualization

Municipality	CIP Preparation	Public Domain Improvement Project	Visualization	TOTAL
Fort Erie	\$ 50,000		\$ 21,562	\$ 71,562
Grimsby	\$ 25,000			\$ 25,000
Lincoln	\$ 25,000			\$ 25,000
Niagara Falls	\$ 35,000	\$ 300,000		\$ 335,000
NOTL	\$ 50,000			\$ 50,000
Pelham	\$ 30,000	\$ 100,000		\$ 130,000
Port Colborne	\$ 160,000	\$ 40,750	\$ 43,000	\$ 243,750
St. Catharines	\$ 90,000		\$ 135,113	\$ 225,113
Thorold	\$ 53,500	\$ 33,625		\$ 87,125
Welland	\$ 50,000	\$ 300,000		\$ 350,000
West Lincoln	\$ 35,000			\$ 35,000
TOTAL	\$ 603,500	\$ 774,375	\$ 199,675	\$ 1,577,550

4.3.2 Smarter Niagara and Local Municipal Incentive Program Results

Table 4 shows the total incentive program applications approved by local municipalities in Niagara between 2003 and 2009. A total of 178 incentive program applications were approved by the five municipalities in Niagara who were actively offering any incentive programs over the period 2003 to 2009. This includes 61 applications in St. Catharines, 59 in Niagara Falls, 36 in Niagara-on-the-Lake, 14 in Welland, and 8 in Thorold. The breakdown of these 178 incentive program applications by municipality and type of program is provided in **Appendix C**.

While a number of the projects that are subject of the 178 applications have been completed, some are in progress, and some are to be built, it is anticipated that when completed, these 178 applications will generate construction estimated at over \$73,125,000 and include the construction of 733 residential units. The total contribution from the Region to the funding of these approved incentive applications is estimated at \$3,210,818 and the total contribution from the Local Municipalities is estimated at \$4,005,440. Examples of some of the projects completed using the Smarter Niagara Incentive Programs and Local Municipal CIP program funding are shown after Table 4 below.

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Table 4 Smarter Niagara and Local Municipal Incentive Program Results

Type of Program	Number of Applications	Number of Residential Units	Contribution		Total Contribution Local and Region	Estimated Project Cost
			Local	Region		
Residential Conversion/Intensification/Construction Grant/Loan	28	348	\$ 1,115,252	\$ 636,830	\$ 1,752,082	\$ 28,214,349
Commercial Building Façade Improvement Grant/Loan	50	na	\$ 441,879	\$ 219,958	\$ 661,837	\$ 3,227,476
Commercial Building Improvement Grant/Loan*	61	na	\$ 431,699	\$ 69,863	\$ 501,562	\$ 1,248,832
Downtown/Commercial Area Revitalization Tax Increment Grant	9	125	\$ 794,453	\$ 1,031,510	\$ 1,825,963	\$ 20,455,828
Brownfield Tax Increment Based Grant	3	141	\$ 946,240	\$ 1,202,740	\$ 2,148,980	\$ 18,529,446
Brownfields Tax Assistance	1	119	\$ 54,384	\$ 24,465	\$ 78,849	\$ 1,450,000
ESA Grant	5	na	\$ 25,452	\$ 25,452	\$ 50,905	na
Municipal Applications/Permit Fees Grant/Refund	21	na	\$ 196,081	\$ -	\$ 196,081	na
TOTAL	178	733	\$ 4,005,440	\$ 3,210,818	\$ 7,216,259	\$ 73,125,931

Notes:

Where an application has been approved for more than one program, the number of residential units and the estimated project cost has been counted only once to avoid double counting.

NP = No program offered

na = not applicable

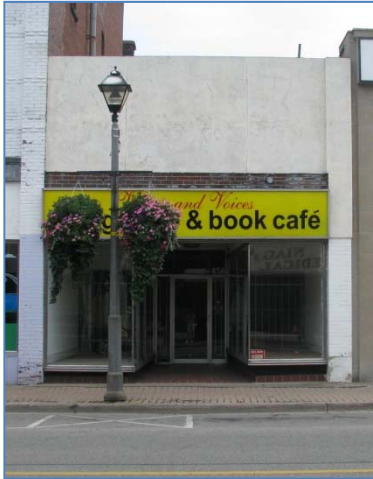
* = also includes Heritage Restoration Improvement Grant/Loan

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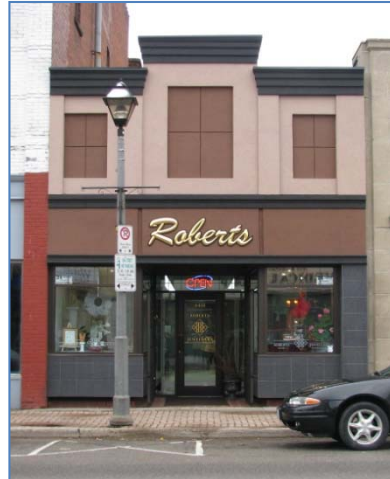
City of Niagara Falls

Downtown, Queen Street, Robert's Jewelers

Building Improvement Loan/ Façade Improvement Grant



Before



After

City of Niagara Falls

Downtown, Morrison Street Apartments

Residential Loan and Tax Increment Grant



Before



After

City of St. Catharines

36 Page Street, Queenston Neighbourhood,

Affordable Housing Project and Community Programing Centre

Residential Grant and Tax Increment Based Grant



Before



After

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City of St. Catharines

*104 St. Paul Street, Downtown,
Façade Improvement Grant*



Before



After

City of Thorold

*Community Credit Union, Downtown
Facade Improvement Grant*



Before



After

City of Thorold

*Law Offices of Young, McNamara, Downtown
Façade Improvement Grant*



Before



After

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City of Welland

*Streetscaping and Sidewalk Reconstruction, Downtown
Public Domain Incentives Program*



Before



After

City of Port Colborne

*Streetscaping, Olde Humberstone Main Street Area
Public Domain Incentives Program*



Before



After

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The Region of Niagara Discussion Paper on Financing of Growth-Related Infrastructure (March 2010) notes that beyond a financial incentive program meeting its policy objectives, there are three fundamental financial tests it must meet in order for it to be judged a success. These are:

- a) How much development occurred that was subject of the incentive?
- b) How much of that development would likely have occurred in the same amount and form without any incentive?
- c) What is the cost/benefit ratio for the Region's investment in the resultant development.

In regards to the Smarter Niagara Incentive Programs that have been implemented through Local Municipal CIP Programs, Table 4 provides an answer to question a) above. Approximately \$73,125,930 in development will occur as a result of funding provided by the Region through the Smarter Niagara Incentive Programs and funding provided by the Local Municipalities through their accompanying CIP programs.

4.3.2.1 The But For Test

Question b) refers to what is known as the “but for test”, i.e., but for the incentive programs being offered, would the development have occurred, and if so, would it have occurred in the same amount and form? This is a very difficult question to answer because it is difficult to obtain valid evidence that increased development in a community where incentive programs have been made would not have occurred in the region anyway. To date no one has developed a valid but for test.

However, insight into the answer to the but for test question can be gained by looking at development activity prior to the introduction of the incentive programs in a community and comparing this with development activity after the introduction of the incentive programs. Specific data on development activity was not collected prior to the 2003 period and compared to the 2003-2009 period for the five municipalities in Niagara offering incentive programs during that period as this was outside the scope of this study. Furthermore, it would be virtually impossible to adjust for other factors such as the impact of the real estate market in the Niagara area and local municipalities over the time period.

Nevertheless, during the consultation sessions, municipal staff and developers from the local municipalities commented on the marked increase in the level of building and property rehabilitation, redevelopment and development activity that was generated by the Smarter Niagara and Local Municipal incentive programs as compared to prior to introduction of these incentive programs. These participants noted that much of this activity was concentrated in the central urban areas and on brownfield sites, i.e., the as designed geographic focus of the Smarter Niagara Incentive Programs. These participants also felt that most of this development activity simply would not have occurred without the availability of the Regionally/Locally funded incentive programs available through CIPs.

4.3.2.2 Cost-Benefit Ratio

Question c) can be answered by comparing the Regional and Local Municipal dollars contributed to the incentive programs to the value of the development that took advantage of the incentive programs. The Discussion Paper on Financing of Growth-Related Infrastructure notes that it is important to calculate and track the cost/benefit ratio (or leverage ratio) for the development that

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results from the Region's investment in incentive programs. This ratio represents a check as to whether the results obtained justify the investment of public funds into private sector projects.

The calculation of cost/benefit ratio, or leverage ratio as referred to in this report, can be done for the total of the CIP programs as well as for individual program types. Table 4 shows that overall, the \$7,216,259 in Regional/Local funding committed to the projects taking advantage of funding available through CIP programs will generate approximately \$65,909,672 in private sector investment as a result of the construction of the committed projects. This represents a healthy overall leverage ratio of approximately 9.1 times the Regional/Local investment.

Because the incentive programs act as a package in most local municipalities, and many of the projects in Table 4 took advantage of more than one program available in a particular municipality, the direct comparison of leverage ratios between program types can lead to incorrect conclusions regarding the relative effectiveness of particular programs. For example, the Commercial Building Façade Improvement Grant/Loan Program has a leverage ratio of 4.0 times which is lower than the leverage ratio of most of the other program types in Table 4. However, participants in the consultation session indicated that the value of this program lies not only in the direct private sector investment benefits, but in the improved visual quality and spin-off investment activity that results from the very visible façade improvements in a downtown area.

Some of the program types, such as the Residential Conversion/ Intensification/Construction Grant/Loan (15.1 times) and the Downtown/Commercial Area Revitalization Tax Increment Grant (10.2 times) have a leverage ratio that is higher than the overall ratio. Some programs, such as the Commercial Building Façade Improvement Grant/Loan (4.0 times) and the Brownfield Tax Increment Based Grant (7.6 times) have leverage ratios that are lower than the overall leverage ratio. However, as previously noted, the leverage ratio alone does not provide conclusive information regarding the cost effectiveness of particular incentive program types.

4.3.2.3 Payback Period

One of the questions raised by the Smarter Niagara Steering Committee when the above-noted programs results were presented to them was regarding the typical "payback period" of the tax increment based grants in Table 4, i.e., the Downtown/Commercial Area Revitalization Tax Increment Grant and the Brownfield Tax Increment Grant. "Payback period" is defined here as the estimated amount of time required for a local municipality and the Region to recoup through increased property tax revenues the amount of tax increment grant supplied to the applicant with no discounting factor for the time value of money has been applied.

To provide an answer to the payback question at the Regional level, an analysis of all the tax increment based grants approved across the Region to date would have to be done to determine the payback period. This is outside the scope of this study. However, to provide some insight into the answer to this question, three applications for the Brownfield Tax Increment Grant in St. Catharines were compared to two applications for the Downtown Tax Increment Grant in St. Catharines and two applications for Downtown Tax Increment Grant in Welland. The payback period for the two Downtown Tax Increment Grant applications in St. Catharines is approximately 9.5 years, and the payback period for the two Downtown Tax Increment Grant applications in Welland is approximately 9.0 years. This contrasts with the payback period for the

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three Brownfield Tax Increment Grant applications in St. Catharines which is approximately 16 years. This result clearly demonstrates that the payback period for typical brownfield redevelopment projects is significantly longer than typical downtown/commercial area redevelopment projects due to the additional costs of remediation and other costs associated with brownfield redevelopment projects. This result suggests that Local and Regional municipalities in Niagara can expect to recoup through increased property tax revenues the amount of tax increment grant supplied to an applicant in less than 10 years for a downtown/commercial area redevelopment project, and in approximately 16 years for a brownfield redevelopment project.

4.3.3 Regional Development Charge Incentive Program Results

Finally, as shown in **Table 5**, between 2003 and 2009, the Region approved 142 applications for Regional Development Charge Reduction for a total reduction in Regional development charges of \$1,783,956. It is estimated that the projects taking advantage of this Regional Development Charge Reduction will produce 374 residential units and 285,905 square feet of non-residential space. However, only 25 (or 18%) of the 142 applications for a Regional Development Charge Reduction achieved the 100% Regional Development Charge reduction for projects that incorporate at least three of the five Smart Growth design criteria. This low level of participating projects incorporating Smart Growth design criteria is of concern. The possible reasons for this are discussed in Section 5.0 of this report.

Table 5 Regional Development Charge Reduction Program Results

Year	Number of Applications	Development Charge Waiver/Exemption	Residential Units	Non-Residential Square Footage
2003	13	\$ 124,213	54	0
2004	9	\$ 234,623	86	6,700
2005	15	\$ 251,071	17	92,344
2006	18	\$ 313,429	21	86,455
2007	26	\$ 232,667	52	44,220
2008	25	\$ 127,996	46	9,055
2009	36	\$ 499,957	98	47,131
TOTAL	142	\$ 1,783,956	374	285,905

4.3.4 Total Regional Funding of Smarter Niagara Incentive Programs

When adding up the funding that the Region has contributed to the preparation of Local CIPs, Local public realm improvement projects, advanced visualization, Local CIP programs and the Regional Development Charge reduction, over the seven year period from 2003 to 2009, the Region has committed approximately \$6,572,234 in funding toward the implementation of its Smarter Niagara Incentive Programs, or an average of just over \$910,000 per year of which an average of \$713,540 per year is for direct provision of grants, loans and Regional development charge reductions. From a budgeting perspective, it is important to note that this average is for only five municipalities who had active CIPs during the 2003 to 2009 time period.

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The demand for Regional funding to prepare CIPs will likely decrease over the next few years with most of the local municipalities in Niagara now having prepared their CIPs. However, as shown in Table 2, the number of local municipalities implementing adopted CIPs will increase in the coming years. Therefore, because the majority of the Smarter Niagara Incentive Programs budget is for the provision of grants and loans, it is anticipated that the average annual Regional budget requirement for the Smarter Niagara Incentive Programs will likely increase in the coming years, even without any increase in the maximum program amounts available under the existing Smarter Niagara Incentive Programs, or the addition of new Smarter Niagara Incentive Programs. Once the increases to maximum Regional funding levels under the existing Smarter Niagara Incentive Programs and new programs are added, it is anticipated that the average annual Regional budget requirement for the Smarter Niagara Incentive Programs will increase.

5.0 CRITICAL NEEDS ANALYSIS

In order to determine critical needs for improvement to the Smarter Niagara Incentive Programs, interviews were conducted with Local CIP Coordinators, other Local Municipal staff, Regional staff responsible for key policy areas, as well as select incentive program applicants and key stakeholders. The Local CIP Coordinators and Regional staff were asked to identify incentive program applicants and key stakeholders to be interviewed. In total, invitations to be interviewed were sent to 27 people and 23 people agreed to be interviewed, including six key stakeholders from the development community. A list of all those interviewed about the Smarter Niagara Incentive Programs is provided in **Appendix D**.

Those interviewed were asked about the effectiveness of the existing Smarter Niagara Incentive Programs, program gaps, possible improvements, administrative issues and future program needs and priorities. The results of these interviews were augmented by the Background Policy Review and feedback received from the Smarter Niagara Steering Committee in order to identify the key critical needs for incentive program revisions and possible new programs. These identified critical needs were used to develop the Draft Preliminary Incentive Program Concepts Report that was circulated to key stakeholders and formed the basis of the stakeholder consultation session held on November 24, 2010.

5.1 Existing Program Effectiveness and Improvements

Generally, those interviewed felt the existing Smarter Niagara Incentive Programs are both appropriate and effective. With the possible exception of the Environmental Assessment Study Grant Program, there was strong support to maintain all the current programs. Façade grants programs were identified as having a highly visible impact that improves the pedestrian environment.

The Local CIP Coordinators and developers interviewed indicated that grants work better than loans, especially for residential intensification, affordable housing and downtown revitalization programs. Some also commented that upfront or project progress grants should be considered for façade and building improvements being made by smaller property owners who may not have enough funding available to initiate projects due to the matching contribution program requirement.

There was also a strong desire to increase maximum incentive program amounts, including the Regional contribution, wherever possible so as to improve the applicability and effectiveness of the incentive programs. This was especially true for heritage restoration and improvement programs as the cost of these projects can be significant. It was also noted that while current brownfield incentive programs are positive, in order to spur more brownfield redevelopment projects, the difference in funding available between brownfield and non-brownfield projects needs to be greater. For example, a brownfield in a downtown should receive significantly more funding than a non-brownfield in the same downtown.

Finally, some of those interviewed stressed that the incentive programs at the Local level (and the accompanying Regional contribution to those programs) need to be more responsive and therefore more flexible to local circumstances and issues. For example, in some downtowns, the

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rehabilitation of existing residential units is as important, or even more important, than creating new residential units.

5.2 Administrative Issues

While the current administration of the Smarter Niagara Incentive Programs was generally viewed as effective, a number of possible improvements were identified. First, the decision by some local municipal finance departments to not front end the Region's share of grants and loans, (including tax increment grants), has created a two-step payment process for the applicant in these municipalities. This practice sees the local municipality paying its share of the grant to the applicant and then waiting for receipt of the Region's share of the grant before providing a second payment to the applicant. The time period between these two payments can often range from two to four weeks, or more. Alternatively, some municipalities wait for receipt of the Region's share of the grant prior to providing a single payment to the applicant. While less cumbersome, this approach still involves a time delay prior to the applicant receiving full payment of the grant or loan as compared to a system where the Local Municipality front ends the Region's share of the payment and then recovers this payment from the Region through a regular reimbursement (e.g., monthly or quarterly) accounting.

The administration of the Smarter Niagara Incentive Programs was originally designed to have the Local Municipalities front end the Region's share of any payment with the Region then reimbursing the Local Municipality on a regular basis, but not necessarily on a per application basis. As the number of applications and number of municipalities requesting Regional funding from the Smarter Niagara Incentive Programs is sure to increase, the current practice being employed by some Local Municipalities of requesting reimbursement on an application by application basis will become more time consuming, cumbersome and less tenable for staff at both the Local and Regional levels. Therefore, it is preferable if payment from the Smarter Niagara Incentive Programs is administered as originally designed, i.e., with the Local Municipalities front ending the Region's share of any payment and the Region then reimbursing the Local Municipality on a regular basis.

Another significant administrative improvement that was identified for the Smarter Niagara Incentive Programs is to have a single staff person at the Regional level responsible for coordinating and responding to local CIP program issues. It was felt that this would help to clarify and standardize program requirements and administrative procedures. The need for a Smarter Niagara Incentive Programs coordinator at the Regional level will likely increase as more municipalities implement their CIPs and therefore request Regional funding from the Smarter Niagara Incentive Programs. Furthermore, less frequent meetings of the Local Municipal CIP Coordinators Group has further highlighted the importance of a single staff person at the Regional level responsible for coordinating and responding to local CIP program issues.

5.3 Program Gaps and Priorities

As previously mentioned, those interviewed felt that the Smarter Niagara Incentive Programs covered a broad range of needs. A number of comments were made regarding program gaps that could possibly be addressed by the Smarter Niagara Incentive Programs. In addition, the Background Policy Review also identified a number of key policy areas that are not adequately

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addressed by the current Smarter Niagara Incentive Programs. These program gaps and strategies for addressing these gaps identified through the policy review, best practices review and the key stakeholder interviews are summarized below.

5.3.1 Building and Façade Improvement Grant/Loan

While the Region does have a matching Building and Façade Improvement Grant/Loan Program, it was suggested that where an applicant was undertaking both façade and building improvements or significant building improvements, the maximum amount offered under the Regional Building and Façade Improvement Grant/Loan Program (\$5,000 for a grant and \$10,000 for a loan) is not sufficient. Alternatively, it was suggested that the Region offer separate programs for building and façade improvement.

5.3.2 Affordable Housing

One of the existing programs gaps identified by a number of those interviewed is the need for a separate program to promote the construction of affordable housing. There are a number of approaches that can be used to implement such a program, including one or more of:

- a) A separate grant/loan program that provides up front grants/loans for, or at least a firm commitment of payment upon completion of, affordable housing units constructed by the not-for-profit and private sectors;
- b) A deferral of development charges for affordable housing by registering the development charge as a second mortgage against the property and having the development charge paid off when the house is sold or after a set period of time.

The above noted affordable housing programs could be funded by an Affordable Housing Reserve Fund as identified in the Regional Policy Plan.

5.3.3 Not-for-Profit Corporations

Another program gap identified is that not-for-profit corporations undertaking improvements to their buildings and properties or constructing new buildings in a downtown or on a brownfield site cannot take advantage of tax increment based grant programs because they do not pay property taxes. Therefore, it was suggested that a separate grant program be established for not-for-profit corporations undertaking such improvements.

5.3.4 Sustainable Forms of Urban Development and Healthy Communities

One of the key program gaps identified by both those interviewed and through the policy review is the need for incentives that promote more sustainable forms of urban development and healthy communities in order to help achieve the goals of the Regional Growth Management Strategy. This includes developments that incorporate LEED certified buildings and neighbourhoods, green buildings, higher densities, and better quality urban design.

Only 25 (18%) of the 142 applications for Regional Development Charge Reduction achieved a 100% reduction of Regional development charges by incorporating Smart Growth design criteria. This ratio is considered to be quite low, and could indicate that current Regional and Local

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incentive programs do not provide enough financial support (or enough of a difference in financial support between projects that promote Smart Growth and those that do not) to encourage most developers to undertake more sustainable forms of urban development.

This finding may also suggest that the Smart Growth design criteria currently used by the Region for the Reduction of Regional Development Charges Program may not provide enough guidance to developers about the types of development that are sustainable and/or may unintentionally exclude certain types development that are sustainable. For example, criteria #3 refers to the “contribution towards the creation of a walkable neighbourhood character”, but there is no indication as to how a non-residential development could contribute to a walkable neighbourhood. Criteria #4 refers to the “creation of a range of housing opportunities and choices” and therefore, criteria #4 does not apply to non-residential projects. It would appear that the Smart Growth design criteria used to determine the level of Regional development charge reduction may be geared more toward residential projects than non-residential projects. This suggests that the Region’s current Smart Growth design criteria need to be reviewed and revised in relation to the Smarter Niagara Incentive Programs.

5.3.5 Farm Building Rehabilitation, New Forms of Agriculture and Value Added Secondary Production

The promotion of farm building rehabilitation, new forms of agriculture and value added secondary production in agricultural areas was identified as a program gap, both in the policy review and by some of the key stakeholders. This issue is seen as one that will become even higher priority over time in terms of the Regional Growth Management Strategy.

5.3.6 Cultural Heritage and the Arts

Financial support for cultural heritage, including the arts, was identified as a key program gap in the policy review and by a number of those interviewed. However, because Section 28 of the *Planning Act* restricts grants and loans to community improvement activities that are property/building based, the ability to provide meaningful incentives to cultural heritage groups through a CIP is limited to building and property improvements. Therefore, in addition to some possible targeting of existing incentive programs to cultural heritage groups, direct funding for cultural heritage activities, either through the existing Public Domain Incentives Program or a separate program, was suggested.

5.3.7 Niagara Gateway Economic Zone and Centre

Finally, incentive programs to help finance the servicing costs and promote sustainable forms of development on employment lands in the Niagara Gateway Economic Zone and Centre were identified as a future priority. These programs will be developed as part of the Niagara Gateway Economic Zone and Centre CIP that is currently underway. Therefore, these programs are not presented in this report.

6.0 PRELIMINARY INCENTIVE PROGRAM CONCEPTS

Based on the results of the background policy review, best practices review, quantitative analysis of the results of the Smarter Niagara Incentive Programs, and interviews with key stakeholders, preliminary incentive program concepts were developed. These consisted of:

- a) proposed revisions to existing Smarter Niagara Incentive Programs; and,
- b) proposed new programs to be added to the existing Smarter Niagara Incentive Programs.

Both the preliminary proposed revisions to existing Smarter Niagara Incentive Programs and preliminary proposed new programs were developed to address the critical needs identified in Section 5.0 of this report. These proposed revisions to the existing Smarter Niagara Incentive Programs and proposed new programs are described below.

6.1 Preliminary Proposed Revisions to Existing Incentive Programs

6.1.1 Regional Development Charge Reduction Program

The current Regional Development Charge Reduction Program offers a reduction of 50% of the applicable development charge for any development in relation to uses other than agricultural use or industrial use located within the boundaries of the designated central urban areas or on a brownfield within the urban area. The Program offers an additional 50% reduction of the applicable development charge in relation to uses other than agricultural use or industrial use where in the opinion of Council of the Region, the development includes at least three of the Region's five Smart Growth design criteria.

Several issues with the Regional Development Charge Reduction Program were noted during the critical needs analysis. First, it was noted that the Regional Development Charge Reduction is not available to industrial uses. Therefore, a brownfield site that is being remediated and redeveloped for industrial use cannot receive a Regional Development Charge Reduction. If a brownfield property is legally designated and zoned for industrial development, this restriction would appear to significantly disadvantage the industrial reuse of that property once it has been remediated. There does not appear to be any logical basis for this restriction.

Next, while 142 applications for Regional Development Charge Reduction have been approved for a total reduction in Regional development charges of \$1,783,956, only 18% of the 142 applications have achieved a 100% reduction of Regional development charges by incorporating Smart Growth design criteria. It is desirable to increase this ratio in order to improve the performance of the Regional Development Charge Reduction Program vis-à-vis achieving the Region's Smart Growth design criteria.

Finally, the critical needs analysis determined that there may not be enough of an incentive difference between brownfield and non-brownfield projects (including downtown projects) to promote brownfield redevelopment. Also, there may not be enough of an incentive difference between projects that incorporate Smart Growth design criteria and those that do not.

In order to address these issues, several revisions to the Regional Development Charge Reduction Program were proposed. These revisions included:

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Concept 6.1.1 a)

Allow industrial redevelopment of a brownfield site outside downtowns to be eligible for the Regional Development Charge Reduction Program.

Concept 6.1.1 b)

Add LEED certification as a criteria to achieve 50% reduction in Regional development charges:

- Option i) Projects located within designated central urban areas or on a brownfield can achieve an additional 50% development charge reduction if they achieve any level of LEED certification; or,
- Option ii) Any project that achieves LEED certification, regardless of location, will receive a 50% development charge reduction. If the project is then within a designated central urban area or on a brownfield, it will receive an additional 50% development charge reduction.

Concept 6.1.1 c)

If the project is on a brownfield site in a designated central urban area, provide a reduction in Regional development charges of 75%. The additional 25% reduction (to 100%) could then be achieved through either incorporation of at least three of the Region's five Smart Growth design criteria or LEED certification.

Concept 6.1.1 d)

Most of the Local Municipal development charge reduction programs allow the costs of environmental remediation approved under a tax increment based grant program to be applied against Local development charges payable. However, the available tax increment grant is then reduced by the amount of remediation costs applied against development charges payable. This is known as an offset. The current Regional Development Charge Reduction Program does not reduce (or offset) the amount the Region contributes to a tax increment based grant program for a brownfield site by the amount of the Regional development charge reduction on that brownfield site.

- Option i) In order to standardize practices between the Region and the Local municipalities, the Region could introduce an offset for brownfield sites similar to that employed by the Local municipalities.
- Option ii) In order to promote brownfield redevelopment projects that incorporate Smart Growth design criteria, the offset of the tax increment grant (Option i above) could be eliminated for brownfield redevelopment projects that incorporate at least three of the Region's five Smart Growth design criteria and/or achieve LEED certification.

Concept 6.1.1 e)

The critical needs analysis indicated that additional clarity may be required regarding the Region's five Smart Growth design criteria. Therefore, it was proposed that the Region develop more detailed Smart Growth design criteria for purposes of the Region's Development Charge Reduction Program.

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6.1.2 Property Rehabilitation and Redevelopment Tax Increment Grant Funding Program

Currently, the Region has a policy of “matching” the percentage and duration of any local property rehabilitation and redevelopment tax increment grant funding program, e.g., a tax increment based downtown revitalization or a tax increment based brownfield redevelopment grant program. In order for the Region’s Property Rehabilitation and Redevelopment Tax Increment Grant Funding Program to better promote brownfields, affordable housing, and sustainable forms of development, it was proposed that the matching policy be amended so that a set tax increment grant for the Regional portion of the property tax increase generated by the project is provided based on a predetermined tax increment grant schedule that favours brownfield redevelopment, affordable housing, and sustainable forms of development.

For example, this predetermined tax increment grant schedule for the Regional share of the tax increment could be as follows:

Concept 6.1.2 a)

Regional Tax Increment Grant Schedule for Projects in Designated Central Urban Areas:

- i) Standard Project = 50% tax increment grant
- ii) Brownfield Redevelopment Project = 75%
- iii) Affordable Housing Project = 75%
- iv) Project that incorporates Smart Growth design criteria = 75%
- v) Project that incorporates two of ii) to iv) above = 90%
- vi) Project that incorporates all three of ii) to iv) above = 100%.

Concept 6.1.2 b)

Regional Tax Increment Grant Schedule for Brownfield Redevelopment Projects:

- vii) Standard Project = 70% tax increment grant
- viii) Designated Central Urban Area = 75%
- ix) Affordable Housing Project = 90%
- x) Project that incorporates Smart Growth design criteria = 90%
- xi) Project that incorporates both ix) and x) above = 100%

6.1.3 Building and Façade Improvement Grant/Loan Program

The main comment during the critical needs analysis regarding the Region’s Building and Façade Improvement Grant/Loan Program was that the maximum funding level of \$5,000 for the grant from the Region is too low. There were also comments made about the Region also providing a grant/loan for side and/or rear façade improvements. There was also some confusion among some local municipalities as to whether or not the Region’s program applies to building improvements. Finally, there were some concerns expressed that some projects that have taken advantage of this program did not achieve an adequate level of urban design. In order to address these issues, a number of revisions to the Region’s Building Improvement and Façade Improvement Grant/Loan Program were proposed as follows:

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Concept 6.1.3 a)

Increase the matching grant available from the Region from the current \$5,000 per property to \$10,000 per property.

Concept 6.1.3 b)

Clarify that the Region's Building and Facade Improvement Grant/Loan Program applies to both façade improvements and/or building improvements and that the entire grant/loan amount is available for either façade or building improvements.

Concept 6.1.3 c)

Require that all projects taking advantage of this Regional grant conform to either applicable local urban design guidelines or the Region's Model Urban Design Guidelines.

Concept 6.1.3 d)

Introduce criteria to guide the provision of upfront funding for certain projects that meet said criteria where the Local Municipality is also providing upfront funding.

6.1.4 Residential Grant/Loan Program

The main comment during the critical needs analysis regarding the Region's Residential Grant/Loan Program was that the maximum funding level of a \$5,000 grant per property from the Region is too low.

In order to address this issue, the following revision to the Residential Grant/Loan Program was proposed:

Concept 6.1.4 a)

Increase the matching grant available from the Region from the current \$5,000 per property to \$7,500 per property.

6.1.5 Heritage Restoration and Improvement Grant/Loan Program

Comments received during the critical needs analysis suggest that the cost of restoring and improving buildings designated under the *Ontario Heritage Act* are quite significant and the current funding programs available for restoration and improvement of heritage buildings are not sufficient to provide a meaningful incentive. Comments were also received regarding the current ineligibility of properties designated under Part V of the *Ontario Heritage Act* (heritage districts) for the Region's Heritage Restoration and Improvement Grant/Loan Program. Currently, only properties designated under Part IV of the *Ontario Heritage Act* are eligible for the Regional Program. Finally, comments were received regarding the ineffectiveness of the Region's existing Heritage Properties Tax Reduction Program (matching to local program up to 40% reduction of property taxes for up to 10 years) in spurring heritage property restoration and improvement. In order to address these issues, a number of revisions to the Region's Heritage Restoration and Improvement Grant/Loan Program and the Region's Heritage Properties Tax Reduction Program were proposed as follows:

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Concept 6.1.5 a)

Increase the matching grant/loan from the Region for residential properties from \$2,500 to \$5,000, and from \$10,000 to \$15,000 for commercial/industrial properties.

Concept 6.1.5 b)

Add properties designated under Part V of the *Ontario Heritage Act* as eligible properties under the program.

Concept 6.1.5 c)

Better promote the existing Heritage Properties Tax Reduction Program (matching to local up to 40% reduction for up to 10 years) to local municipalities, but revise the eligibility requirements of the program so that is only available for heritage properties that have used the Region's Heritage Restoration and Improvement Grant/Loan Program to undertake restoration/ improvements to eligible heritage properties.

6.1.6 Environmental Assessment Study Grant Program

Of all the Smarter Niagara Incentive Programs, this is the only one where comments pertaining to an increase in funding level were not received. Also, only five applications for this program have been processed by local municipalities to date. Therefore, it is not clear that this program is having the desired impact, i.e., promoting the undertaking of environmental site assessments. Therefore, the following revision to the Environmental Assessment Study Grant Program was proposed:

Concept 6.1.6 a)

Phase out the program and shift funding to the other Regional programs that promote brownfield redevelopment.

6.1.7 Public Domain Incentives Program

Comments received during the critical needs analysis indicated that this program is highly valued by the Local Municipalities. While the program currently does give some preference to projects that include heritage and/or public art components, it was suggested that this preference could be strengthened in order to better utilize these projects to support cultural heritage. While the program requires a minimum 6% green component cost, the critical needs analysis indicated that these projects could be greener in order to promote the Region's Smart Growth principles. In order to address these issues, a number of revisions to the Region's Public Domain Incentives Program were proposed as follows:

Concept 6.1.7 a)

Require that a certain percentage of the available funding, e.g., 50%, be provided to projects that incorporate heritage and/or public art components.

Concept 6.1.7 b)

Create a separately funded category under the program that is exclusively for heritage and/or public art themed projects.

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Concept 6.1.7 c)

Increase the minimum 6% green component cost to 10%.

6.2 Proposed New Incentive Programs

The critical needs analysis suggested that a number of new incentive programs should be considered in order to address identified existing programs gaps and key future priorities in the following areas:

- construction of affordable housing.
- not-for-profit corporations undertaking improvements to their buildings and properties or constructing new buildings in a downtown or on a brownfield site cannot take advantage of tax increment based grant programs because they do not pay property taxes.
- promotion of farm building rehabilitation, new forms of agriculture and value added secondary production in agricultural areas;
- support for cultural heritage, including the arts.

In order to address these programs gaps and key future priorities, a number of new Smarter Niagara Incentive Programs were proposed. These proposed new Smarter Niagara Incentive Programs are described below.

6.2.1 Affordable Housing Grant/Loan Program

This new grant program would be available in addition to all of the existing and proposed new incentive programs. Therefore, an affordable housing project would be eligible to apply for the existing Residential Grant/Loan Program and the new Affordable Housing Grant/Loan Program. This program would be funded through a Regional Affordable Housing Reserve Fund. This program would provide a flow through grant/loan to projects constructing affordable housing. The Affordable Housing Grant/Loan Program would provide a matching grant/loan working on the same basis as the existing Residential Grant/Loan Program with the maximum Regional grant/loan for affordable housing equal to \$7,500 per unit and a maximum of 20 units per property.

6.2.2 Regional Development Charge Deferral Program for Affordable Housing

This proposed program would provide a deferral of Regional development charges payable on private and public sector affordable housing projects. The Regional development charges would not be paid as normal at the time of building permit issuance. Instead, the Regional development charge payable would be registered on title as a second mortgage. This second mortgage would be paid off when the unit is sold (ownership unit) or within a set period of time (ownership unit/rental unit). This type of program has been utilized in the private sector to improve the affordability of residential units.

6.2.3 Agricultural Feasibility Study Grant

This program would provide a matching grant equal to up to \$7,500 for studies that determine if existing agricultural/rural buildings and facilities can be converted or adapted to specialty in-

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demand agricultural or agri-tourism uses, as well as business plans for new agriculture and agriculture related uses. Eligible studies include but are not limited to:

- a) structural analyses;
- b) evaluation of existing and proposed mechanical, electrical and other building systems;
- c) concept plans;
- d) market analyses;
- e) business plans; and,
- f) other feasibility study as approved by the Local Municipality.

The feasibility study must provide significant information with respect to one or more aspects of the structural/engineering feasibility of the project and associated costing, conceptual feasibility, and/or the market/economic feasibility of the project.

6.2.4 Agricultural Buildings and Facilities Revitalization Grant

This program would provide a matching tax increment based grant for up to ten (10) years similar to the Property Rehabilitation and Redevelopment Tax Increment Funding Program Grant Programs for physical improvements to existing agricultural properties, buildings and facilities that promote farm building rehabilitation, new forms of agriculture, and value added secondary production in agricultural areas.

6.2.5 Direct Funding for Cultural Heritage and Arts Projects and Programs

The critical needs analysis identified a clear need to support cultural heritage including the arts. Discussions with Local and Regional staff and a meeting with the Region's Culture Committee confirmed that this need for financial support is both for physical structures (buildings) and program activities. Grants and loans can be provided under Section 28 of the *Planning Act* for the development, redevelopment, construction and reconstruction of lands and buildings for rehabilitation purposes or for the provision of energy efficient uses, buildings, structures, works, improvements or facilities. These grants and loans can even be targeted to certain uses such as cultural heritage/arts uses. However, Section 28 of the *Planning Act* cannot be used to provide grants and loans for activities that do not involve the development, redevelopment, construction and reconstruction of lands and buildings. Therefore, the use of incentive programs within a CIP adopted under Section 28 of the *Planning Act* is limited in its ability to address the critical needs of cultural heritage groups.

The proposed revisions to the existing Heritage Restoration and Improvement Grant/Loan Program (Section 6.1.5) and the existing Public Domain Incentives Program (Section 6.1.7) would improve the ability of these programs to support cultural heritage. However, because Section 28 of the *Planning Act* is limited in its ability to directly address the program and other needs of cultural heritage groups, it was proposed recommended that these needs be directly addressed through a separate **Funding Program for Cultural Heritage and Arts Projects**.

7.0 STAKEHOLDER AND PUBLIC CONSULTATION

This section of the reports contains a summary of the stakeholder and public consultation conducted to obtain input on the preliminary Smarter Niagara Incentive Program concepts contained in Section 6.0 of this report. A detailed description of the stakeholder and public consultation is contained in **Appendix E**. Input received from the stakeholder and public consultation exercise was used to revise the preliminary incentive program concepts contained in Section 6.0 of this report and ultimately produce the final recommendations regarding the Smarter Niagara Incentive Programs contained in Section 8.0 of this report.

7.1 Stakeholder Consultation

7.1.1 Methodology

The project consultant and Regional staff developed a list of 72 key stakeholders who were invited to attend a stakeholder consultation session that was held on November 24, 2010. This list included a broad range of local municipal and Regional staff and representatives from the development and real estate industries, downtown BIAs, and chamber of commerce representatives. In total, 39 key stakeholders (54% of those invited) attended the consultation session. Prior to the consultation session, the key stakeholders were sent a copy of the Draft Preliminary Incentive Program Concepts.

At the Stakeholder Consultation Session, the project consultant presented the proposed revisions to the existing Smarter Niagara Incentive Programs and the proposed new incentive programs. Following the presentation, those in attendance were divided into four (4) pre-assigned workshop groups. In relation to the proposed revisions to the existing Smarter Niagara Incentive Programs and the proposed new incentive programs, the workshop groups were asked to determine and discuss:

- i) Their support for the proposed incentive program concept;
- ii) Preferred incentive program concept where there was more than one concept presented;
- iii) Improvements and refinements that could be made to the proposed incentive program concepts; and,
- iv) Any required key incentive program revisions or new incentive programs that were not listed.

Each of the group facilitators took summary notes of the group discussions on flip charts. At the end of the consultation session, each workshop group then utilized these flip charts to report the results of their discussion back to the entire audience. The flip charts were then collected and further analyzed by the project consultant. Those in attendance were also invited to send written comments to Regional staff. Written comments were received from two people in attendance at the consultation session. These written comments were also analyzed by the project consultant.

Finally, once the Draft Report containing recommendations was prepared in September of 2011, this report was circulated to the Local Municipal CIP Coordinators and the Draft Report was presented to the Local Municipal CIP Coordinators at a meeting held on October 14, 2011. Verbal and written comments received from the Local Municipalities during and after the meeting were reviewed prior to finalization of this report.

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7.1.2 Results

The results of the Stakeholder Consultation Session are presented below. General comments about the incentive programs are presented first. This is followed by a review of the program specific comments provided by each workshop group and written comments that were received.

7.1.2.1 General Comments

The Review and Update of the Smarter Niagara Incentive Programs was well received by key stakeholders who reinforced the need to review and update the Smarter Niagara Incentive Programs at this time. The key stakeholders indicated that they were generally supportive of the approach and methodology used to develop the proposed incentive program concepts. The key stakeholders supported most of the proposed incentive program concepts, but suggested a number of revisions and refinements.

A few of the keys stakeholders pointed out that some of the consultation session participants did not have a good understanding of the existing Smarter Niagara Incentive Programs. This was in fact also observed during the discussions in the workshop groups. This finding suggests that both the Region and Local Municipalities need to concentrate more on educating key stakeholders about the available incentive programs and how they work.

In terms of administration of the existing programs, there was some confusion on the part of the local municipalities regarding the administration of the Smarter Niagara incentive programs. The need for a Regional Smarter Niagara Incentive Programs Coordinator was cited as very important to the ongoing administration of the Smarter Niagara Incentive Programs.

The workshop participants raised a number of concerns around the complexity of administering some of the more progressive incentive programs proposed such as the proposed revisions to the Regional Development Charge Reduction Program and the Property Rehabilitation and Redevelopment Tax Increment Grant Funding Program. While generally supportive of the policy principles behind the proposed revisions, a number of participants saw the proposed program revisions as too complex. Yet, there was general support for the proposal to develop more detailed Regional Smart Growth Design Criteria.

From a policy perspective, several issues were raised by the key stakeholders who participated in the consultation session. First, the now long-standing principle of the Region requiring matching funding from local municipalities for the Smarter Niagara Incentive Programs was questioned by some key stakeholders. Some participants felt that this long standing principle should be revisited for incentive programs that could be seen more as a Regional responsibility and/or programs where the local municipalities would have difficulty providing matching funding, e.g., affordable housing and promoting agriculture.

Another policy issue that was discussed in at least two of the workshop groups is whether CIP incentive programs should even be used to support cultural heritage and affordable housing. While consensus was reached on this issue, a number of key stakeholders felt these issues are more suited to being addressed through direct funding that is not CIP based.

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The issue of ensuring adequate funding for the Smarter Niagara Incentive Programs was raised by all the workshop groups. Clearly, there is concern that all the Smarter Niagara Incentive Programs be adequately funded into the future. While there was general support for a number of the proposed incentive program funding increases and new incentive programs, some key stakeholder suggesting that all approved Smarter Niagara Incentive Programs be adequately funded, even if that means fewer programs are approved than those being proposed.

Finally, several key stakeholders indicated that it is important to determine and make clear to the key stakeholders the impact of changes to existing programs on existing approved projects, especially large multi-phase projects, and the impact on projects currently going through the incentive application process.

7.1.2.2 Program Comments

During the workshop sessions, the key stakeholders provided numerous comments on the proposed preliminary incentive program concepts. A summary of the comments from the workshop groups on the specific preliminary incentive program concepts is provided in **Table E-1 in Appendix E**. Applicable additional written comments on the specific preliminary incentive program concepts received after the consultation session are also summarized in Table E-1. Where a cell is blank in Table E-1, no comment was provided on that particular incentive program concept. Therefore, general support for that concept can be assumed.

7.2 Public Consultation

7.2.1 Methodology

Based on input received during and after the stakeholder consultation session, a number of revisions were made to the Preliminary Incentive Program Concepts contained in the November 2010 Draft Report. These revised Preliminary Incentive Program Concepts were then presented at a Public Open House held on March 23, 2011.

The public open house was attended by five members of the public including several development industry representatives, as well as two Local Municipal CIP coordinators. Those attending the public open house were provided with a comment sheet where they could rate the importance of the proposed revised and new Smarter Niagara Incentive Programs. Three comment sheets were received along with one comment via e-mail.

7.2.2 Results

7.2.2.1 General Comments

Those in attendance at the public open house were generally very supportive of the revisions to the preliminary incentive program concepts. Several themes emerged from the comments received during and after the public open house which reinforce comments received during the stakeholder consultation session, including a need for:

- Clear incentive programs that can be easily understood and applied for;

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- Greater clarity with respect to the Smart Growth Design Criteria that apply to the Regional Development Charges Reduction Program; and,
- The Region to fill the Smarter Niagara Incentive Programs Coordinator position with a qualified person as soon as possible.

7.2.2.2 Program Comments

Comments from the public open house showed very strong support for most of the proposed revisions to the existing Smarter Niagara Incentive Programs. While there was generally support for the proposed new incentive programs, this support was not as strong as the support for the proposed revisions to the existing Smarter Niagara Incentive Programs. Several of the participants at the public open house expressed concern that the addition of new programs (such as the programs to support affordable housing and agriculture) not jeopardize funding for the existing core Smarter Niagara Incentive Programs which have been very successful to date. There was concern that with a limited amount of funding for the Smarter Niagara Incentive Programs, and more local municipalities drawing on the existing Smarter Niagara Incentive Programs in the coming years, that the proposed new incentive programs potentially stray too far from the original intent of the Smarter Niagara Incentive Programs which was to promote and encourage:

- Brownfield redevelopment;
- Downtown and commercial core area redevelopment;
- Residential conversion and intensification; and,
- Heritage restoration and improvement.

(See Reports CAO 8-2002 and CAO 13-2002)

8.0 INCENTIVE PROGRAM RECOMMENDATIONS

The recommendations regarding the Smarter Niagara Incentive Programs contained in this section of the report were developed based on a comprehensive methodology as outlined in Section 1.3 of this report. This methodology included:

- A policy review key Regional policy documents and reports to determine policy direction for the Smarter Niagara Incentive Programs;
- A review of innovative best incentive program practices used by other Ontario municipalities;
- Review and quantitative analysis of the uptake and economic results of the Smarter Niagara Incentive Programs from 2003 until 2009;
- Interviews with key stakeholders who have an interest in the Smarter Niagara Incentive Programs;
- The identification of program gaps, possible improvements, administrative issues and future program needs and priorities for the Smarter Niagara Incentive Programs;
- Preparation of Preliminary Incentive Program Concepts;
- Review of comments received from key stakeholders during and after a Stakeholder Consultation Session and Public Open House;
- Preparation of Incentive Program Recommendations based on the Preliminary Incentive Program Concepts and the comments received during and after the Stakeholder Consultation Session; and,
- Finalization of the Incentive Program Recommendations and preparation of this Final Report based on comments received during and after a consultation session held with the Local Municipal CIP Coordinators in October of 2011.

The recommended revisions to the existing Smarter Niagara Incentive Programs and the recommended new programs to be added to the Smarter Niagara Incentive Programs are summarized in **Table 6** below. Revisions to six of the existing seven Smarter Niagara Incentive Programs are recommended, while no change is recommended to the Environmental Assessment Study Grant Program, which will remain in effect as is. Three new programs are recommended for addition to the Smarter Niagara Incentive Programs.

A detailed description of the recommended program revisions and new programs is provided following Table 6 in Sections 8.1 and 8.2. General administrative guidelines (as applicable) for each of the recommended revised and new Smarter Niagara Incentive Programs is contained in **Appendix F**. Sections 8.3, 8.4 and 8.5 contain administration, budget and other recommendations for the Smarter Niagara Incentive Programs.

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Table 6 Summary of Recommended Smarter Niagara Incentive Program Revisions and New Programs

Reference Number	Program Name	Type of Program Change	Description
8.1.1	Regional Development Charge Reduction Program	Revision	<ul style="list-style-type: none"> a) Make brownfield sites that are being redeveloped for industrial use outside downtowns eligible. b) Develop clearer and more complete Smart Growth Design Criteria. c) If project is on a brownfield and in central urban area, provide automatic 75% reduction in Regional development charges instead of 50%.
8.1.2	Property Rehabilitation and Redevelopment Tax Increment Funding Program	Revision	<ul style="list-style-type: none"> a) Region will continue to match local percentage tax increment grant, but if project is brownfield redevelopment, affordable housing or conforms to Region's Smart Growth Design Criteria, Region will provide minimum 75% tax increment grant.
8.1.3	Building and Façade Improvement Grant/Loan	Revision	<ul style="list-style-type: none"> a) Clarify that Regional grant/loan applies to both façade and building improvement and full amount available for either type. b) Increase matching grant/loan from Region for front façade improvement and/or building improvement from \$5,000 to \$10,000. c) Introduce a matching grant/loan from Region for side and/or rear façade improvement of up to \$10,000. d) Require that all façade improvements conform to Local Municipal urban design guidelines or the Region's Model Urban Design Guidelines.
8.1.4	Residential Grant/Loan Program	Revision	<ul style="list-style-type: none"> a) Increase matching grant from Region from \$5,000 per unit to \$7,500 per unit.
8.1.5	Heritage Restoration and Improvement Grant/Loan	Revision	<ul style="list-style-type: none"> a) Increase matching grant/loan from Region for designated residential properties from \$2,500 to \$5,000 and from \$10,000 to \$15,000 for designated commercial/ industrial properties. b) Add properties that included within boundary of heritage conservation district designated under Part V of the Ontario Heritage Act as eligible.
8.1.6	Public Domain Incentives Program	Revision	<ul style="list-style-type: none"> a) Evaluate applications using Region's new Smart Growth Design Criteria.

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Table 6 Summary of Recommended Smarter Niagara Incentive Program Revisions and New Programs (Cont'd)

8.2.1	Affordable Housing Grant/Loan Program	New	Program provides matching Regional grant/loan for construction of new or renovation of existing residential units for affordable housing. Matching contribution from Local Municipality required with maximum Regional grant/loan of \$7,500 per unit and maximum of 20 units per property. This grant/loan would be available in addition to the existing Residential Grant/Loan.
8.2.2	Agricultural Feasibility Study Grant	New	Program provides matching Regional grant for studies that determine if existing agricultural/rural buildings and facilities can be converted or adapted to specialty in-demand agricultural or agri-tourism uses, as well as business plans for new agriculture and agriculture related uses. Matching contribution from Local Municipality required with maximum Regional grant of \$7,500.
8.2.3	Agricultural Buildings and Facilities Revitalization Grant	New	Program provides matching tax increment based grant for up to ten (10) years for physical improvements to existing agricultural properties, buildings and facilities that promote farm building rehabilitation, conversion to bio-fuels, new forms of agriculture, and value added secondary production in agricultural areas.
8.2.4	Direct Funding for Cultural Heritage and Arts Projects and Programs	NA	It is recommended that the program and other needs of cultural heritage groups be directly addressed through a separate Funding Program for Cultural Heritage and Arts Projects that falls outside the auspices of a CIP program.

8.1 Recommended Revisions to Existing Incentive Programs

8.1.1 Regional Development Charge Reduction Program

Description of Existing Program

The current Regional Development Charge Reduction Program offers a reduction of 50% of the applicable development charge for any development in relation to uses other than agricultural use or industrial use located within the boundaries of the designated central urban areas or on a brownfield within the urban area. The Program offers an additional 50% reduction of the applicable development charge in relation to uses other than agricultural use or industrial use located within the boundaries of the designated central urban areas or on a brownfield within the urban area where in the opinion of Council of the Region, the development includes at least three of the Region's five Smart Growth design criteria.

Recommended Revisions to the Existing Program

Revision 8.1.1 a)

Amend the Regional Development Charges By-law to allow brownfield sites that are being redeveloped for industrial use outside downtowns to be eligible for the Regional Development Charge Reduction Program.

Revision 8.1.1 b)

The Region will develop clearer and more complete Smart Growth Design Criteria. The existing criteria will be clarified, detailed and augmented as necessary to provide better guidance to project proponents on how to adequately incorporate the Region's Smart Growth design criteria into their projects. The actual preparation of new Smart Growth Design Criteria is outside the scope of the Review and Update of the Smarter Niagara Incentive Programs.

It is recommended that the Region also determine whether or not it will continue to rely on internal review of applications that seek out the additional 50% Regional Development Charge Reduction for incorporation of Smart Growth design criteria, or whether it will allow qualified professionals to certify that a project adequately incorporates the Region's Smart Growth Design Criteria.

Transition Rule for Revision 8.1.1 b)

Applications previously approved/not approved for a Regional Development Charge Reduction will not be permitted to reapply or request reconsideration.

Revision 8.1.1 c)

If the project is on a brownfield site **and** in a designated central urban area, the Region will provide a 75% reduction of the Regional Development Charges payable. The additional 25% reduction (to 100%) could then be achieved through incorporation of the Region's Smart Growth design criteria.

8.1.2 Property Rehabilitation and Redevelopment Tax Increment Funding Program

Description of Existing Program

The Region has a policy of “matching” the percentage and duration of any local property rehabilitation and redevelopment tax increment grant funding program, e.g., a tax increment based downtown revitalization or a tax increment based brownfield redevelopment grant program.

Recommended Revisions to the Existing Program

Revision 8.1.2 a)

The Region will continue to match the percentage and duration of any local property rehabilitation and redevelopment tax increment grant paid by the local municipality, but if the project is a brownfield redevelopment project, affordable housing project, or it conforms to the Region’s Smart Growth design criteria, it will receive a minimum 75% Regional Property Rehabilitation and Redevelopment Tax Increment Grant.

Transition Rule for Revision 4.1.2 a)

Applications previously approved/not approved for a Regional Property Rehabilitation and Redevelopment Tax Increment Grant will not be permitted to reapply or request reconsideration.

8.1.3 Building and Façade Improvement Grant/Loan Program

Description of Existing Program

The Region provides a matching grant or loan on a cost shared basis with the local municipality for the structural improvement of buildings and/or the improvement of building facades. The maximum grant from the Region is \$5,000 per property and the maximum matching loan from the Region is \$10,000 per property.

Recommended Revisions to the Existing Program

Revision 8.1.3 a)

Clarify that the Region’s matching Building and Facade Improvement Grant/Loan applies to both façade improvements and/or building improvements and the entire amount is available for either façade or building improvements.

Revision 8.1.3 b)

Increase the matching grant for front façade improvement and/or building improvement available from the Region from the current \$5,000 per property to \$10,000 per property.

Revision 8.1.3 c)

Introduce a matching grant/loan component for side and/or rear façade improvements on a cost shared basis with the local municipality with a maximum grant/loan from the Region for side and/or rear façade improvements of \$10,000.

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Revision 8.1.3 d)

The Region will require that all façade improvement projects taking advantage of this Regional program must conform to either applicable local urban design guidelines that are aligned with the Region's Model Urban Design Guidelines, or alternatively, the Region's Model Urban Design Guidelines.

8.1.4 Residential Grant/Loan Program

Description of Existing Program

The Region provides a matching grant or loan on a cost shared basis with the local municipality to promote residential conversion, infill and intensification. The maximum grant from the Region is \$5,000 per unit and 20 units per property. The maximum matching loan from the Region is \$10,000 per unit and 20 units per property.

Recommended Revisions to the Existing Program

Revision 8.1.4 a)

Increase the matching grant available from the Region from the current \$5,000 per unit to \$7,500 per unit.

8.1.5 Heritage Restoration and Improvement Grant/Loan Program

Description of Existing Program

The Region provides a matching grant or loan on a cost shared basis with the local municipality to promote the restoration and improvement of buildings designated under Part IV of the Ontario Heritage Act. The Region provides a maximum grant or loan of \$2,500 per residential property and \$10,000 per commercial or industrial property.

Recommended Revisions to the Existing Program

Revision 8.1.5 a)

Increase the matching grant/loan from the Region for designated residential properties from \$2,500 to \$5,000 and from \$10,000 to \$15,000 for designated commercial/industrial properties.

Revision 8.1.5 b)

Add properties that are included within the boundary of heritage conservation district designated under Part V of the *Ontario Heritage Act* as eligible properties under the Heritage Restoration and Improvement Grant/Loan Program.

8.1.6 Public Domain Incentives Program

Description of Existing Program

The Region provides a matching grant on a cost shared basis with the local municipality to a maximum grant from the Region of \$100,000 per project to support public realm improvements already identified in or in compliance with municipal planning documents including CIPs,

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Secondary Plans or Official Plans. This programs is based on a competitive evaluation process whereby the project must meet the Region’s eligibility criteria. These criteria include a “green component” constituting a minimum of 6% of overall project cost and compliance with local urban design guidelines or the Region’s Model Urban Design Guidelines. Preference is given to projects that include heritage and/or public art components.

Recommended Revisions to the Existing Program

Revision 8.1.6 a)

In addition to the current program criteria, applications to this program should also be evaluated using the Region’s new Smart Growth Design Criteria as applicable to public sector projects (see Revision 8.1.1 b)).

8.2 Recommended New Incentive Programs

8.2.1 Affordable Housing Grant/Loan Program

Recommended Program

This grant/loan program would provide a matching Regional grant or loan for construction of new or renovation of existing residential units for affordable housing. This grant or loan would work on the same basis as the existing Residential Grant/Loan Program (matching contribution from Local Municipality) with a maximum Regional grant or loan of \$7,500 per unit and maximum of 20 units per property. This program would be funded through a Regional Affordable Housing Reserve Fund. This grant would be available in addition to the existing Residential Grant/Loan.

Program Notes

“Affordability” for rental and ownership units must be clearly defined for this program through the use of qualifying criteria.

A mechanism must be developed to ensure the unit remains affordable over an extended period of time, e.g., registration of a mortgage or other encumbrance for the grant/loan amount on title.

The requirement for a matching Local Municipality contribution will be reviewed as Local Municipalities may have difficulty matching the Regional grant portion.

The details of this program, including the program definition of affordability, the specific mechanism to be utilized to ensure that units remain affordable, and program administration, will be developed in consultation with Niagara Regional Housing and the Local Municipalities.

8.2.2 Agricultural Feasibility Study Grant

Recommended Program

This program would provide a matching grant equal to up to \$7,500 for studies that determine if existing agricultural/rural buildings and facilities can be converted or adapted to specialty in-

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demand agricultural or agri-tourism uses, as well as business plans for new agriculture and agriculture related uses. Eligible studies include but are not limited to:

- a) structural analyses;
- b) evaluation of existing and proposed mechanical, electrical and other building systems;
- c) concept plans;
- d) market analyses;
- e) business plans; and,
- f) other feasibility study as approved by the Local Municipality.

The feasibility study must provide significant information with respect to one or more aspects of the structural/engineering feasibility of the project and associated costing, conceptual feasibility, and/or the market/economic feasibility of the project.

Program Notes

The requirement for a matching Local Municipality contribution will be reviewed as Local Municipalities may have difficulty matching the Regional grant portion.

Implementation of this program will require that participating Local Municipalities prepare an Agricultural CIP that contains this program or a comprehensive/multi-purpose CIP that contains this program, or that the Region prepare a master level CIP that contains this program and that participating Local Municipalities can adopt.

8.2.3 Agricultural Buildings and Facilities Revitalization Grant

Recommended Program

This program would provide a matching tax increment based grant for up to ten (10) years similar to the Property Rehabilitation and Redevelopment Tax Increment Funding Program Grant Program. The Agricultural Buildings and Facilities Revitalization Grant would be for physical improvements to existing agricultural properties, buildings and facilities that promote farm building rehabilitation, conversion to bio-fuels, new forms of agriculture, and value added secondary production in agricultural areas. The eligible activity must result in an increase in assessment value, and therefore property taxes.

Program Notes

Implementation of this program will require that participating Local Municipalities prepare an Agricultural CIP that contains this program or a comprehensive/multi-purpose CIP that contains this program, or that the Region prepare a master level CIP that contains this program and that participating Local Municipalities can adopt.

8.2.4 Direct Funding for Cultural Heritage and Arts Projects and Programs

Recommended Program

The revision to the existing Heritage Restoration and Improvement Grant/Loan Program (Section 8.1.5) has been designed to help improve the ability of this program to support cultural heritage. However, because Section 28 of the *Planning Act* cannot be used to provide grants and loans for activities that do not involve the development, redevelopment, construction and reconstruction of

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lands and buildings, the Region and Local Municipalities are very limited in their ability to directly address program and other critical needs of cultural heritage groups. Therefore, it is recommended that the program and other needs of cultural heritage groups be directly addressed through a separate Funding Program for Cultural Heritage and Arts Projects that falls outside the auspices of a CIP program.

Program Notes

Any future proposed program to provide direct funding for Cultural Heritage and Arts Projects and Programs should link to the Region's Culture Plan.

8.3 Administration Recommendations

The following recommendations apply to the administration of the Smarter Niagara Incentive Programs. Implementation of these recommendations will make the administration of the Smarter Niagara Incentive Programs more efficient, timely and responsive. However, cooperation between the two tiers will be required to fully implement these recommendations, and in particular, the recommendations that require Local Municipal participation.

8.3.1 CIP Contacts Group

Several participants in the consultation session mentioned that communication and information sharing around CIP programs had decreased since the CIP Contacts Group stopped meeting on a regular basis a few years ago. This may have contributed to the lack of clarity with respect to program eligibility and administration procedures with respect to the Smarter Niagara Incentive Programs on the part of some Local Municipal CIP Coordinators and other Local Municipal staff. *Therefore, it is recommended that the CIP Contacts Group begin meeting again on a regular basis (3 to 4 times per year) and that Regional staff coordinate these meetings, take meeting notes, and disseminate these notes to all members of the CIP Contacts Group.*

8.3.2 Smarter Niagara Incentive Programs Coordinator

It is recommended that the Region establish an Incentive Programs Coordinator position and that this position be responsible for a number of roles, including but not necessarily limited to:

- a) acting as a liaison between Local Municipal CIP coordinators staff and Regional planning, finance, legal and other staff with regards to the administration of the Smarter Niagara Incentive Programs;*
- b) receiving, processing and administering requests for matching Regional program assistance from the Local Municipalities;*
- c) planning and coordinating meetings of the CIP Contacts Group, including the dissemination of meeting notes and required follow-up;*
- d) marketing the Smarter Niagara Incentive Programs to property owners, developers, and others both within and outside the Region;*
- e) monitoring Smarter Niagara Incentive Program spending and results and reporting these results to Regional Council on a regular basis;*
- f) liaising with Local Municipal CIP coordinators to obtain monitoring data, and ensure this data is collected and organized in a consistent and standardized manner;*

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- g) developing revisions to the Smarter Niagara Incentive Programs based on monitoring results and ongoing input from the Local Municipal CIP coordinators and other key stakeholders; and,***
- h) acting as a project expeditor in relation to project issues involving the Smart Growth Incentive Programs.***

The ideal candidate for the Smarter Niagara Incentive Programs Coordinator position will possess a strong planning and/or economic development background. The ideal candidate will also possess strong analytical, statistical, report writing, presentation, and communication skills. The ideal candidate will also have some policy development and marketing experience as well as experience dealing with finance and legal (agreements and contracts) matters in relation to land development. ***Based on current and anticipated future levels of incentive program applications within the Region, it is recommended that the Incentive Programs Coordinator position be a full-time position and that one Regional staff person be dedicated solely to the responsibilities outlined above.***

8.3.3 Incentive Program Monitoring and Reporting

Another comment that was made by several of the key stakeholders was that incentive program monitoring and reporting of monitoring results needs to be improved in several ways. First, the local municipal cost input data and economic impact data used to calculate program funding and results (see Section 4.3) has been maintained by the local municipalities in varying formats, level of detail and time periods. In some municipalities, this data was not readily available and had to be assembled strictly for the purposes of this study. This made analysis and comparison of program input and results data between different municipalities, and the aggregation of this data to provide results for the Region as a whole, very difficult and time consuming. In addition, monitoring results are formally reported at differing intervals and in different formats by different local municipalities.

Therefore, it is recommended that the Region in consultation with Local Municipalities develop a standardized framework for monitoring and reporting incentive program funding (inputs) and economic and other impacts (outputs). This standardized format should be utilized by all local municipalities within Niagara Region to prepare annual monitoring reports of their incentive programs (CIP programs and development charge reduction programs). ***It is recommended that the Incentive Programs Coordinator be responsible for assisting in the development of this standardized incentive programs monitoring and reporting framework. Further, it is recommended that the Incentive Programs Coordinator would then be responsible for assembling data from Regional departments and the Local Municipalities and providing an annual report and updates (as required) regarding progress on implementation of the Smarter Niagara Incentive Programs to the Smarter Niagara Steering Committee and Regional Council.***

8.3.4 Financial Administration

The decision by some local municipal finance departments to not front-end the Region's share of grants and loans, (including tax increment grants), has resulted in a lengthier and more complicated process for the payment of grants and loans to successful applicants in these municipalities. As the number of municipalities with CIP incentive programs increases in

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Niagara, the number of municipalities requesting Regional funding from the Smarter Niagara Incentive Programs is sure to increase. The current practice being employed by some local municipalities of requesting reimbursement on an application by application basis will become more time consuming, cumbersome and less tenable for staff at both the Local and Regional levels. Continuation of this practice also makes payment of the grant or loan more complicated for the successful applicant. Furthermore, the administration of the Smarter Niagara Incentive Programs was originally designed to have the Local Municipalities front end the Region's share of any payment with the Region then reimbursing the Local Municipality on a regular basis, but not necessarily on a per application basis. It was not designed to be, as one stakeholder put it, a "treasurer to treasurer transaction".

Therefore, it is recommended that the Smarter Niagara Incentive Programs be financially administered as originally intended, i.e., with Local Municipalities front-ending the Region's share of any approved incentive program payment, and the Region then reimbursing the Local Municipality on a regular basis, e.g., quarterly. To further streamline payment of approved tax increment grant payments, it is recommended that the local municipality simply retain the portion of the annual Regional tax increment collected by the local municipality (as this amount will be known) and provide a single payment to the successful applicant of the Local/Regional tax increment grant. Prior to providing this payment, local municipality staff would notify Regional staff of the amount of this payment and obtain Regional staff concurrence on the amount of the payment. The balance of the Regional property taxes collected on that property by the local municipality would be forwarded to the Region as normal.

8.4 Budget Recommendations

The Region has been budgeting approximately \$750,000 per year for implementation of the Smarter Niagara Incentive Programs. This budget has been used to fund:

- i) the direct provision of grants and loans to the Local Municipalities for approved Local Municipal CIP program applications;
- ii) grants for Local Municipal public domain improvement projects;
- iii) Regional Development Charge Reductions;
- iv) the preparation of Local Municipal CIPs; and,
- v) advanced visualization exercises related to individual redevelopment projects/districts in the local municipalities.

The Public Domain Incentives Program has been growing in popularity with the Region spending almost \$400,000 on this program in 2010. However, the Public Domain Incentives Program is funded from monies not spent in the current budget year and previous budget years. As demand for the other incentive programs is anticipated to increase in future years along with demand for the Public Domain Incentives Program, this approach to budgeting for the Public Domain Incentives Program is not viewed as sustainable. ***Therefore, it is recommended that a portion of the total annual budget for the Smarter Niagara Incentive Programs be dedicated to the Public Domain Incentives Program.***

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Of the above-noted items, only advanced visualization does not relate to implementation of the Smarter Niagara Incentive Programs. Advanced visualization represents a local planning exercise, and therefore it is not appropriate to fund this item from the budget established for the Smarter Niagara Incentive Programs. While CIPs can also be considered a local planning exercise, they differ from other local planning work in that CIPs establish the framework for and permit the flow of Smarter Niagara Incentive Program funding to the Local Municipalities. Therefore, it is appropriate to fund CIPs from the Smarter Niagara Incentive Programs budget as they are an enabling planning tool for the Smarter Niagara Incentive Programs.

The issue of “budget scope creep” with respect to the Smarter Niagara Incentive Programs budget being targeted for funding of local planning work is one that the Region must address immediately. For example, a report prepared by the Policy Task Force of the Regional Niagara Bicycling Committee (RNBC) recently recommended that the Region’s Integrated Community Planning (ICP) Department provide an incentive to Local Municipalities for cost-sharing of the preparation of Local Municipal Bicycle Master Plans. The RNBC report proposed that this cost-sharing be in the form of a 50% matching grant paid to the Local Municipality for the cost of preparing a Local Municipal Bicycle Master Plan, to a maximum grant from the Region of \$25,000. This is very similar to the grant provided by the Region to Local Municipalities to prepare CIPs. The RNBC report argues that the ICP has a cost sharing structure in place for local planning studies. However, as already stated, this is not the intention of the grant program that the Region has in place for the preparation of Local CIPs. The Region helps local municipalities fund the preparation of CIPs because approved CIPs are the primary way in which the Region flows Smarter Niagara incentives Programs funding to the local municipalities. The Regional funding for CIPs is not meant for other local planning studies. ***Therefore, it is recommended that:***

- a) Advanced visualization exercises no longer be funded from the Smarter Niagara Incentive Programs budget; and,***
- b) Local plans and Local planning exercises/work other than Local CIPs not be funded from the Smarter Niagara Incentive Programs budget.***

While the demand for Regional funding to prepare CIPs will likely decrease over the next few years because most of the local municipalities in Niagara now having prepared their CIPs, the number of local municipalities implementing adopted CIPs will increase in the coming years. Therefore, because most of the Smarter Niagara Incentive Programs budget is for the provision of grants, loans and Regional development charge reductions, it is anticipated that the average annual Regional budget requirement for the Smarter Niagara Incentive Programs will likely increase somewhat in the coming years, even without the increase in the maximum program amounts available under the existing Smarter Niagara Incentive Programs or the addition of new Smarter Niagara Incentive Programs recommended in this report.

If all the recommended revisions to the existing Smarter Niagara Incentive Programs and new programs recommended in this report are approved, it is anticipated that the average annual Regional budget requirement for the Smarter Niagara Incentive Programs (currently \$750,000 per year) will increase significantly. It is anticipated that this increase in budget requirement could be up to \$250,000 per year over and above the current \$750,000 that is budgeted per year by the Region for the Smarter Niagara Incentive Programs. ***Therefore, it is recommended that if the Region approves the recommended increase in Regional funding levels for the existing***

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Smarter Niagara Incentive Programs and the new programs recommended in this report, then the Region should consider increasing the budget amount allocated to the Smarter Niagara Incentive Programs based on the revised and new Smarter Niagara Incentive Programs. (N.B. At the time of writing of this report, a request for an increase of \$250,000 to the budget for the Smarter Niagara Incentive Programs has been included in the 2012 Regional budget submission).

8.5 Other Recommendations

8.5.1 Marketing of the Smarter Niagara Incentive Programs

Several of the key stakeholders including the Local Municipal CIP Coordinators indicated that awareness and understanding of the Smarter Niagara Incentive Programs could be improved among members of the development industry and their support professionals. This program gap was confirmed by the nature of some of the questions being asked by key stakeholders during the consultation session. ***Therefore, once the Smarter Niagara Incentive Programs have been revised, it is recommended that the Region, led by the Incentive Programs Coordinator:***

- a) Prepare a Primer on the Smarter Niagara Incentive Programs that describes the programs that are available and how they integrate with locally available CIP incentive programs, including general information on program eligibility, application and administration procedures;***
- b) Enhance the marketing of the Smarter Niagara Incentive Programs including:***
 - i) Presentations to development industry representatives and their support professionals (planners, engineers, architects, real estate professionals, financial institutions, lawyers, accountants, environmental consultants, etc...);***
 - ii) A semi-annual newsletter containing profiles of successful projects across the Region that have utilized the Smarter Niagara Incentive Programs;***
 - iii) Preparation and updating of marketing materials such as brochures and/or pamphlets that provide summary information on the Smarter Niagara Incentive Programs and accompany the Primer on the Smarter Niagara Incentive Programs;***
 - iv) Enhancement of the Region's web page via addition of direct (one-click) access to information on the Smarter Niagara Incentive Programs, the aforementioned newsletter and marketing materials, and direct links to the Local Municipal CIP program and application materials.***

8.5.2 Agricultural CIP(s)

The promotion of farm building rehabilitation, new forms of agriculture and value added secondary production in agricultural areas was identified as a program gap, both in the policy review and by some of the key stakeholders. This issue is seen as one that will become higher priority for a number of municipalities in Niagara in terms of the Regional Growth Management Strategy in coming years.

Therefore, it is recommended that prior to developing and implementing the programs recommended in this report to promote new forms of agriculture and value added secondary production in agricultural areas (see Section 8.2.2 and 8.2.3), the Region discuss the issue of

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agricultural incentives with local municipalities to determine their level of interest and ability/willingness to fund these programs in partnership with the Region.

Depending on the response from the local municipalities, it is then recommended that the Region in consultation with interested local municipalities consider preparation and adoption of a “Master Agriculture CIP” or individual Local Agriculture CIPs that local municipalities in Niagara can adopt to promote agriculture and that contain at a minimum the incentive programs recommended in Sections 8.2.2 and 8.2.3 of this report.

8.5.3 Provincial Participation in the Smarter Niagara Incentive Programs

Members of the Smarter Niagara Steering Committee and a few key stakeholders noted that the Province does not cost share in any of the Smarter Niagara Incentive Programs. Yet, the projects that take advantage of these programs help to achieve the policy objectives in the Places to Grow Growth Plan. This is particularly evident when one views the impressive results of the CIP programs in Downtown St. Catharines which is identified as an Urban Growth Centre in the Places to Grow Plan. ***Therefore, it is recommended that the Province cost share with the Region and its Local Municipalities in the Smarter Niagara Incentive Programs because these programs clearly help achieve Provincial policies such as the Places to Grow Growth Plan for the Greater Golden Horseshoe.***

APPENDIX A

Current Smarter Niagara Incentive Programs

A CURRENT SMARTER NIAGARA INCENTIVE PROGRAMS

The Smarter Niagara Incentive Programs were endorsed by Regional Council in 2002. The Smarter Niagara Incentives Program contains several incentive programs and these are described below. The Region has established that it will provide a matching proportionate share of any financial incentive offered by an area municipality, subject to a maximum share from the Region as specified in the Smarter Niagara Incentive Programs. The Region and area municipalities in Niagara established a Region/Area Municipality Incentive Coordinating Committee to coordinate the provision of these incentives through local community improvement plans.

A.1 Reduction of Regional Development Charges

In Downtown Areas and on brownfield sites, the Region offers a reduction of 50% of the Regional development charge for new residential, commercial or institutional development or conversion of existing buildings to those uses. An additional 50% Development Charge waiver is available to developments that include at least three of the Region's five Smart Growth design criteria into the proposed development (see **Appendix B**). While the Region encourages local municipalities to establish a reduction program for local development charges in central urban areas and on brownfields, the Reduction of Regional Development Charges is available even if the local municipality does not have a similar program.

A.2 Property Rehabilitation and Redevelopment Tax Increment Funding Program

The purpose of this grant is to stimulate building and property rehabilitation or redevelopment. This includes downtown sites and brownfield sites. The Region will match the percentage of the tax increment generated by a rehabilitation or redevelopment project that is paid by the municipality in the form of a grant to the applicant. Because the Regional tax share is larger than the local municipal tax share, this means that the Region will contribute more to the tax increment based grant than the local municipality.

A.3 Building and Facade Improvement Grant/Loan Program

The purpose of this program is to promote the structural improvement of buildings and/or the improvement of building facades. The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per property, or a matching loan from the Region of \$10,000 per property.

A.4 Residential Grant/Loan Program

The purpose of this program is to promote residential conversion, infill and intensification. The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per unit and 20 units per property, or a matching loan from the Region of \$10,000 per unit.

A.5 Heritage Restoration and Improvement Grant/Loan Program

The purpose of this program is to promote the restoration and improvement of buildings designated under the Ontario Heritage Act. The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant or loan from the Region of \$2,500 per residential property and \$10,000 per commercial or industrial property.

A.6 Environmental Assessment Study Grant Program

The purpose of this program is to promote the undertaking of environmental site assessments so that better information is available with respect to the type of contamination and potential remediation costs on brownfield properties. The Region will provide a matching grant on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per property to promote the completion of Phase II Environmental Site Assessments, Remedial Work Plans and Risk Assessments.

A.7 Public Domain Incentives Program

This program was introduced in 2007. The Region will provide a matching grant on a cost shared basis with the local municipality to a maximum grant from the Region of \$100,000 per project to support public realm improvements already identified in or in compliance with municipal planning documents including CIPs, Secondary Plans or Official Plans. This program is based on a competitive evaluation process whereby the project must meet the Region's eligibility criteria. These criteria include a "green component" constituting a minimum of 6% of overall project cost and compliance with local or Regional urban design guidelines. Preference will be given to projects that include heritage and/or public art components.

APPENDIX B

Niagara Region Smart Growth Design Criteria

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Niagara Region Smart Growth Design Criteria

- 1) ***Intensification of an existing use*** – means redevelopment or building addition that adds floor area and/or a residential unit(s).
- 2) ***Creation of mixed uses*** – means redevelopment, addition or conversion that adds a new compatible uses or uses to a building or property or new development that proposes a mixed use building or a mix of uses on the site.
- 3) ***Contribution towards the creation of a walkable neighbourhood character*** – means development, redevelopment, addition or conversion within a neighbourhood context that features one or more of the following:
 - Safe and clearly demarcated pedestrian access to and within the development site;
 - Building orientation and pedestrian access oriented toward the street;
 - Site and building access directly from the street without requiring passage across a driveway or parking area;
 - Street oriented building facade featuring fenestration and entranceways that create a sense of permeability and movement between the street and the building interior;
 - Contribution to the quality of the public space on the street by the provision of space for public assembly;
 - Street furniture, artworks and/or landscaping.
- 4) ***Creation of a range of housing opportunities and choices*** – means development, redevelopment, addition or conversion that adds multiple unit housing types to the housing stock.
- 5) ***Reduced setbacks from roadways*** – means development, redevelopment or conversion that places the building facade at the front lot line or closer to the street than the mid-point between the street line and the existing building. Where there is an existing building line along the block face that is set back from the street line, “reduced setbacks from roadways” means placing the building facade closer to the street line than the mid-point between the street line and the established building line.

APPENDIX C

Smarter Niagara and Local Municipal Incentive Program Results by Municipality

Review and Update of the Smarter Niagara Incentive Programs

City of St. Catharines

Type of Program	Number of Applications	Number of Residential Units	Contribution		Total Contribution Local and Region	Estimated Project Cost
			Local	Region		
Residential Conversion/Intensification/Construction Grant/Loan	23	184	\$ 800,100	\$ 539,800	\$ 1,339,900	\$ 15,380,984
Commercial Building Façade Improvement Grant	16	na	\$ 104,354	\$ 49,354	\$ 153,708	\$ 590,666
Commercial Building Improvement Grant	NP	NP	NP	NP	NP	NP
Downtown/Commercial Area Revitalization Tax Increment Grant	2	76	\$ 221,912	\$ 271,385	\$ 493,297	\$ 9,874,463.00
Brownfield Tax Increment Based Grant	3	141	\$ 946,240	\$ 1,202,740	\$ 2,148,980	\$18,529,446.00
Brownfields Tax Assistance	1	119	\$ 24,465	\$ 54,384	\$ 78,849	\$ 1,450,000.00
Municipal Applications/Permit Fees Grant/Refund	16	na	\$ 133,793	\$ -	\$ 133,793	na
TOTAL	61	520	\$2,230,864	\$2,117,663	\$ 4,348,527	\$ 45,825,559

Notes:

Where an application has been approved for more than one program, the number of residential units and the estimated project cost has been counted only once to avoid double counting.

NP = No program offered.

na = not applicable.

City of Niagara Falls

Type of Program	Number of Applications	Number of Residential Units	Contribution		Total Contribution Local and Region	Estimated Project Cost
			Local	Region		
Residential Conversion/Intensification/Construction Grant/Loan	2	123	\$ 188,502	\$ -	\$ 188,502	(See Note 1) \$ 9,928,365
Commercial Building Façade Improvement Grant	(See Note 2) 25	na	\$ 293,595	\$ 140,604	\$ 434,199	(See Note 2) \$ 898,950
Commercial Building Improvement Grant	(See Note 2) 25	na	\$ 361,836	\$ -	\$ 361,836	(See Note 2) \$ 898,950
Downtown/Commercial Area Revitalization Tax Increment Grant	4	4	(See Note 3) \$ 396,205	(See Note 3) \$ 558,238	\$ 954,443	(See Note 1) 10,081,365.00
Brownfield Tax Increment Based Grant	0	0	\$ -	\$ -	\$ -	\$ -
Brownfields Tax Assistance	0	0	\$ -	\$ -	\$ -	\$ -
ESA Grant	3	na	\$ 15,000	\$ 15,000	\$ 30,000	na
Municipal Applications/Permit Fees Grant/Refund	NP	NP	NP	NP	NP	NP
TOTAL	59	127	\$1,255,138	\$ 713,842	\$ 1,968,980	\$21,807,630

Notes:

Where an application has been approved for more than one program, the number of residential units and the estimated project cost has been counted only once to avoid double counting.

NP = No program offered.

na = not applicable.

1 Estimated project cost for projects using both the Residential Loan and Revitalization Tax Increment Grant split 50/50 between the two programs

2 Number of applications and Total Estimated Project Cost of \$1,797,700 split in half because joint program.

3 Estimated based on 2010 City and Regional Commercial Occupied Tax Rates.

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City of Welland

Type of Program	Number of Applications	Number of Residential Units	Contribution		Total Contribution Local and Region	Estimated Project Cost
			Local	Region		
Residential Conversion/Intensification/Construction Grant/Loan	3	41	\$ 126,650	\$ 97,030	\$ 223,680	\$ 2,905,000
Commercial Building Façade Improvement Grant/Loan	3	na	\$ 13,930	\$ -	\$ 13,930	\$ 27,860
Commercial Building Improvement Grant	NP	NP	NP	NP	NP	NP
Downtown/Commercial Area Revitalization Tax Increment Grant	3	45	\$ 176,336	\$ 201,887	\$ 378,223	\$ 500,000
Brownfield Tax Increment Based Grant	0	0	\$ -	\$ -	\$ -	\$ -
Brownfields Tax Assistance	0	0	\$ -	\$ -	\$ -	\$ -
ESA Grant	2	na	\$ 10,452	\$ 10,452	\$ 20,905	na
Municipal Applications/Permit Fees Grant/Refund	3	na	\$ 38,288	\$ -	\$ 38,288	\$ -
TOTAL	14	86	\$ 365,656	\$ 309,369	\$ 675,026	\$ 3,432,860

Notes:

Where an application has been approved for more than one program, the number of residential units and the estimated project cost has been counted only once to avoid double counting.

NP = No program offered.

na = not applicable.

City of Thorold

Type of Program	Number of Applications	Number of Residential Units	Contribution		Total Contribution Local and Region	Estimated Project Cost
			Local	Region		
Residential Conversion/Intensification/Construction Grant/Loan	NP	NP	NP	NP	NP	NP
Commercial Building Façade Improvement Grant	6	na	\$ 30,000	\$ 30,000	\$ 60,000	\$ 1,710,000
Commercial Building Improvement Grant	NP	NP	NP	NP	NP	NP
Downtown/Commercial Area Revitalization Tax Increment Grant	0	-	\$ -	\$ -	\$ -	\$ -
Brownfield Tax Increment Based Grant	NP	NP	NP	NP	NP	NP
Brownfields Tax Assistance	0	-	\$ -	\$ -	\$ -	\$ -
Municipal Applications/Permit Fees Grant/Refund	2	na	\$ 24,000	\$ -	\$ 24,000	na
TOTAL	8	0	\$ 54,000	\$ 30,000	\$ 84,000	\$ 1,710,000

Notes:

Where an application has been approved for more than one program, the number of residential units and the estimated project cost has been counted only once to avoid double counting.

NP = No program offered.

na = not applicable.

tbd = to be determined by City of Thorold staff

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Town of Niagara-on-the-Lake

Type of Program	Number of Applications	Number of Residential Units	Contribution		Total Contribution Local and Region	Estimated Project Cost
			Local	Region		
Residential Conversion/Intensification/Construction Grant/Loan	NP	NP	NP	NP	NP	NP
Commercial Building Façade Improvement Grant	NP	NP	NP	NP	NP	NP
Commercial Building Improvement Grant (Heritage Grant)	36	na	\$ 69,863	\$ 69,863	\$ 139,726	\$ 349,882
Downtown/Commercial Area Revitalization Tax Increment Grant	NP	NP	NP	NP	NP	NP
Brownfield Tax Increment Based Grant	NP	NP	NP	NP	NP	NP
Brownfields Tax Assistance	NP	NP	NP	NP	NP	NP
Municipal Applications/Permit Fees Grant/Refund	NP	NP	NP	NP	NP	NP
TOTAL	36	tbd	\$ 69,863	\$ 69,863	\$ 139,726	\$ 349,882

Notes:

Where an application has been approved for more than one program, the number of residential units and the estimated project cost has been counted only once to avoid double counting.

NP = No program offered.

na = not applicable.

tbd = to be determined by staff.

APPENDIX D

Key Stakeholders Interviewed

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Local Municipal CIP Coordinators and Local Municipal Staff

Bob Bolibruck, City of Niagara Falls, Planning and Development Department
Bryan Morris, City of St. Catharines, Planning Services
Jack Bernardi, City of Thorold, Planning Department
Akin Ogunkeye, City of Welland, Planning Department
Leah Wallace, Town of Niagara-on-the-Lake, Planning Department
Barbara Wiens, Town of Niagara-on-the-Lake, Planning Department
Serge Felicetti, City of Niagara Falls, Economic Development Department
John Barnsley, City of Niagara Falls, Planning and Development Department
Rebecca Cann, City of St. Catharines, Recreation and Community Services Department
Lindsay Richardson, City of Port Colborne, Planning Department

Regional and NEDC Staff

Terri Donia, Niagara Region, Integrated Community Planning, Culture and Local Food Policy
Curt Benson, Niagara Region, Community and Corporate Planning, Climate Action Plan
Dianne Coppola, Niagara Region, Active Transportation and Healthy Communities
George Repar, Niagara Economic Development Corporation

Development Community

Alastair Davis, Habitat for Humanity
Tim Kenny, Tim Kenny Consulting
Ronald Fritz, Heritage property owner in Niagara-on-the-Lake
Paul Phelps, Phelps Homes
Philip Ritchie, Keefer Development and Historic Niagara
Jonathon Whyte, Mountainview Homes

Others Outside Niagara

Rebecca Condon, City of Toronto Planning Department
Brooke Lambert, City of Waterloo Planning, Housing and Community Services Department
Terry Boutlilier, City of Kitchener, Business and Planning Services, Economic Development Department

APPENDIX E

Stakeholder and Public Consultation Methodology and Results

1.0 Stakeholder Consultation

1.1 Methodology

The project consultant and Regional staff developed a list of 72 key stakeholders who were invited to attend a stakeholder consultation session that was held on November 24, 2010 at the Four Points Sheraton in Thorold. This list included local municipality CIP coordinators and other local municipal staff, Regional staff in several departments, Niagara Economic Development Corporation (NEDC) staff, representatives from the development and real estate industries, and downtown business improvement area (BIA) and chamber of commerce representatives. In total, 39 key stakeholders (54% of those invited) attended the consultation session, with the sectoral breakdown of attendees as follows:

- 11 (28%) Local Municipal staff (including CIP coordinators);
- 10 (26%) Developers;
- 6 (15%) Regional staff;
- 6 (15%) BIA/ Chamber of Commerce representatives;
- 3 (8%) NEDC staff; and,
- 3 (8%) Other/non-governmental organization.

This is a representative sample of the 72 invited stakeholders and represents a broad cross-section of the key stakeholders.

Along with the invitation to the Stakeholder Consultation Session, key stakeholders were sent a copy of the Draft Preliminary Incentive Program Concepts Summary that contained the proposed revisions and additions to the existing Smarter Niagara Incentive Programs as contained in Section 6.0 of this report.

At the Stakeholder Consultation Session, the project consultant presented the proposed revisions to the existing Smarter Niagara Incentive Programs and the proposed new incentive programs. In addition, the project consultant presented the methodology and rationale used to develop these proposed preliminary incentive program concepts. The presentation was followed by a question and answer session.

Following the presentation by the project consultant, those in attendance were broken into four (4) pre-assigned workshop groups to ensure that each workshop group contained a representative cross-section of key stakeholders. The project consultant and three senior Regional staff members each facilitated a workshop group in discussing the proposed preliminary incentive program concepts. In relation to the proposed revisions to the existing Smarter Niagara Incentive Programs and the proposed new incentive programs, the workshop groups were asked to determine and discuss:

- i) Their support for the proposed incentive program concept;
- ii) Preferred incentive program concept where there was more than one incentive concept presented;
- iii) Improvements and refinements that could be made to the proposed incentive program concepts; and,
- iv) Any required key incentive program revisions or new incentive programs that were not listed.

Review and Update of the Smarter Niagara Incentive Programs

In all cases, workshop participants were asked to consider their critical needs when commenting on proposed incentive program concepts. Each of the group facilitators took summary notes of the group discussions on flip charts. At the end of the consultation session, each workshop group then utilized these flip charts to report the results of their discussion back to the entire audience. The flip charts were then collected and further analyzed by the project consultant.

Those in attendance were also invited to send written comments to Regional staff. Written comments were received from two people in attendance at the consultation session. These written comments were also analyzed by the project consultant.

1.2 Results

The results of the Stakeholder Consultation Session are presented below. General comments about the incentive programs received at the Stakeholder Consultation Session and after the session in written comments are presented first. This is followed by a detailed review of the program specific comments provided by each workshop group and written comments that were received.

1.2.1 General Comments

Based on verbal comments from stakeholders at the consultation session and the written comments received, the Review and Update of the Smarter Niagara Incentive Programs was well received by key stakeholders. The key stakeholders reinforced the need to review and update the Smarter Niagara Incentive Programs at this time. The key stakeholders indicated that they were generally supportive of the approach and methodology used to develop the proposed incentive program concepts. Also, the key stakeholders supported most of the proposed incentive program concepts, but suggested a number of revisions and refinements.

A couple of the developer representatives in the audience suggested that the estimated economic impact figures associated with projects that have taken advantage of the Smarter Niagara Incentive Programs should include direct, indirect and induced impacts in order to present a more complete picture of the economic impact of the incentive programs (the economic impact figures reported in the November 2010 Draft Report include only direct economic impacts). While one of the developers offered to provide case study data to this end, this data was not provided.

A few of the key stakeholders pointed out that some of the consultation session participants did not have a good understanding of the existing Smarter Niagara Incentive Programs in terms of available funding, eligibility criteria and the administration process. This was in fact also observed during the discussions in the workshop groups. One example of this is that a few stakeholders suggested that the prohibition on “double dipping” of incentive programs needed to be better explained. Another example of this is that some key stakeholders were not clear on who can receive a tax increment based grant. These stakeholders asked if a tax increment grant must be paid to the developer who incurred the costs or if it can be transferred to a third party? This finding suggests that both the Region and Local Municipalities need to concentrate more on educating key stakeholders about the available incentive programs and how they work. This education regarding available incentive programs will be increasingly important as the Region finalizes and implements the revised and any new Smarter Niagara Incentive Programs.

Review and Update of the Smarter Niagara Incentive Programs

In terms of administration of the existing programs, there was some confusion on the part of the local municipalities regarding the administration of the Smarter Niagara incentive programs. The need for a Regional Smarter Niagara Incentive Programs Coordinator was cited as very important to the ongoing administration of the Smarter Niagara Incentive Programs.

The workshop participants raised a number of concerns around the complexity of administering some of the more progressive incentive programs proposed, e.g., some of the proposed revisions to the Regional Development Charge Reduction Program and the Property Rehabilitation and Redevelopment Tax Increment Grant Funding Program. While generally supportive of the policy principles behind the proposed revisions, a number of participants saw the proposed program revisions as too complex. Yet, there was general support for the proposal to develop more detailed Guidelines for achieving the Region's Smart Growth Design criteria.

From a policy perspective, several issues were raised by the key stakeholders who participated in the consultation session. First, the now long-standing principle of the Region requiring matching funding from local municipalities for the Smarter Niagara Incentive Programs was questioned by some key stakeholders. For certain critical need areas that are seen more as a Regional responsibility, e.g., affordable housing, the requirement for matching funding from local municipalities is seen as a factor that may limit the success of some incentive programs. Therefore, some participants felt that this long standing principle should be revisited for incentive programs that could be seen more as a Regional responsibility and/or programs where the local municipalities would have difficulty providing matching funding, e.g., affordable housing and promoting agriculture.

Another policy issue that was discussed in at least two of the workshop groups is whether CIP incentive programs should even be used to support cultural heritage and affordable housing. Discussion centered on the whether or not it might be more appropriate to provide direct funding to these activities instead of using CIP programs. No consensus was reached on this issue, but the discussions did indicate that a number of key stakeholders feel these issues may be more suited to being addressed through direct funding that is not CIP based. The resolution of this issue was seen to be especially important as more CIPs come on line in Niagara over the next few years and there is a concomitant increase in competition for and pressure on the available Smarter Niagara Incentive Programs.

The issue of ensuring adequate funding for the Smarter Niagara Incentive Programs was raised by all the workshop groups. Clearly, there is concern that all the Smarter Niagara Incentive Programs be adequately funded into the future. While there was general support for a number of the proposed incentive program funding increases and new incentive programs, this concern expressed itself with some key stakeholder suggesting that all approved Smarter Niagara Incentive Programs be adequately funded, even if that means fewer programs are approved than those being proposed.

Finally, several key stakeholders indicated that it is important to determine and make clear to the key stakeholders the impact of changes to existing programs on existing approved projects, especially large multi-phase projects, and the impact on projects currently going through the incentive application process.

Review and Update of the Smarter Niagara Incentive Programs

1.2.2 Program Comments

During the workshop sessions, the key stakeholders provided numerous comments on the proposed preliminary incentive program concepts. A summary of the comments from the workshop groups on the specific preliminary incentive program concepts is provided in **Table E-1** below. Applicable additional written comments on the specific preliminary incentive program concepts received after the consultation session are also summarized in Table E-1. Where a cell is blank in Table E-1, no comment was provided on that particular incentive program concept. Therefore, general support for that concept can be assumed.

2.0 Public Consultation

2.1 Methodology

Based on input received during and after the stakeholder consultation session, a number of revisions were made to the Preliminary Incentive Program Concepts contained in the November 2010 Draft Report. This included the elimination of a number of the more administratively complex preliminary program revision concepts and one of the preliminary new program concepts from further consideration. These revised Preliminary Incentive Program Concepts were then presented at a Public Open House held on March 23, 2011 at the Regional Administration Building in Thorold. The public open house was advertised in local newspapers.

The public open house was attended by five members of the public including several development industry representatives, as well as two Local Municipal CIP coordinators. Those attending the public open house were provided with a comment sheet where they could rate the importance of the proposed revised and new Smarter Niagara Incentive Programs. As well, those filling out the comment sheets could provide their input on any other program revisions or additions they felt should be made to the Smarter Niagara Incentive Programs. Three comment sheets were received along with one comment via e-mail.

2.2 Results

2.2.1 General Comments

Those in attendance at the public open house were generally very supportive of the revisions to the preliminary incentive program concepts. Several themes emerged from the comments received during and after the public open house which reinforce comments received during the stakeholder consultation session, including a need for:

- Clear incentive programs that can be easily understood and applied for;
- Greater clarity with respect to the Smart Growth Design Criteria that apply to the Regional Development Charges Reduction Program; and,
- The Region to fill the Smarter Niagara Incentive Programs Coordinator position with a qualified person as soon as possible.

Review and Update of the Smarter Niagara Incentive Programs

2.2.2 Program Comments

Comments from the public open house showed very strong support for most of the proposed revisions to the existing Smarter Niagara Incentive Programs. While there was generally support for the proposed new incentive programs, this support was not as strong as the support for the proposed revisions to the existing Smarter Niagara Incentive Programs. To this end, several of the participants at the public open house expressed concern that the addition of new programs not jeopardize funding for the existing core Smarter Niagara Incentive Programs which have been very successful to date. The key concern was that if new programs are added to the existing Smarter Niagara Incentive Programs, and Regional and Local budgets are not also increased to accommodate these new programs, there could then be financial pressure to reduce or eliminate some of the existing incentive programs.

There was also some concern that the proposed new programs such as the program to support affordable housing, the programs to support agriculture, and the recommendation for direct funding of cultural heritage and arts projects and programs, not dilute the existing Smarter Niagara Incentive Programs. There was concern that with a limited amount of funding for the Smarter Niagara Incentive Programs, and more local municipalities drawing on the existing Smarter Niagara Incentive Programs in the coming years, that the proposed new incentive programs potentially stray too far from the original intent of the Smarter Niagara Incentive Programs which was to promote and encourage:

- Brownfield redevelopment;
- Downtown and commercial core area redevelopment;
- Residential conversion and intensification; and,
- Heritage restoration and improvement.

(See Reports CAO 8-2002 and CAO 13-2002)

The concern from stakeholders about the new programs potentially stretching budgetary resources and straying too far from the original focus of the Smarter Niagara Incentive Programs is understandable. It reflects that the existing programs have been largely successful and users of those programs do not want to see the programs eroded at the expense of new programs.

Table E-1 Summary of Workshop Group Comments on Preliminary Incentive Program Concepts

Preliminary Incentive Program Concept	Workshop Group				Other Comments
	1	2	3	4	
REVISIONS TO EXISTING PROGRAMS					
6.1.1 Regional Development Charge Reduction					
6.1.1 a) Allow industrial development outside downtowns to be eligible for the Regional Brownfields DC Reduction Program.	Supported.		No agreement.	Brownfields should be paying no or low DCs because services already in place.	Support only if funds available.
6.1.1 b) Projects in central urban area or on a brownfield get additional 50% Regional DC reduction if project achieves LEED certification.	Supported, but allow qualified professionals to certify that project achieves Smart Growth design criteria based on established criteria/guidelines.		Cost of LEED may be prohibitive on smaller projects. Consider LEED as an add-on. Resolve administrative issue – timing of collection of DC .vs. timing of LEED certification. Sustainability criteria should be established similar to Town of The Blue Mountains example.	Supported. Higher the level of LEED certification, higher the DC reduction. Provide site specific DC waiver/reduction near institutions. Provide 100% DC reduction for registered charities. Not-for-profit on a case by case basis.	Sustainability criteria should be established similar to Town of The Blue Mountains example. LEED can be very expensive for smaller projects.
6.1.1c) Automatic 75% reduction of Regional DC if project in central urban area and a brownfield. Additional 25% Regional DC reduction if project achieves at least 3 of the 5 Regional Smart Growth design criteria or is LEED certified.	Supported, but allow flexibility in application of Smart Growth design criteria, e.g., they can be met for the overall project but not every project phase has to meet the Smart Growth design criteria.	Supported, but brownfields warrant a larger differential than that proposed.	Same as 6.1.1 b) above.		
6.1.1 d) Reduce (offset) Regional tax increment based grant by amount of remediation costs applied against Regional DC. Eliminate offset for brownfield projects that achieve at least 3 of the 5 Regional Smart Growth design criteria or are LEED certified.	Not supported because it would put brownfields at a disadvantage versus projects in central urban areas where both the tax increment based grant and the development charge reduction is available.		Same as 6.1.1 b) above.	Not supported. Need more of an incentive to help brownfields. Need certainty that DC reduction will still be in place when development takes place.	Supported.
6.1.1 e) Region to develop more detailed guidelines for achieving the Region’s Smart Growth design criteria in relation to the Regional DC Reduction Program.	Supported.	Supported. Need clarification regarding Smart Growth design criteria. Once established, the criteria should be certain and should not change.	Supported. Update Region’s Smart Growth Principles/criteria and link these to green infrastructure.		
6.1.2 Property Rehabilitation and Redevelopment Tax Increment Grant Funding Program					
6.1.2 a) Pre-determined Regional tax increment grant schedule for projects in designated central urban areas.	Generally supported, but increase base amount for brownfield projects to 80%.	Supported, but: 50% seems reasonable for standard projects; need transition rules for applications already in application stream; and, need clarification regarding Smart Growth design criteria.	Current matching system is simpler, but may not advance policy objectives. Details must be clear so as to provide certainty to the developer. Ideally, local municipalities would utilize a similar grant schedule, but this would require amendments to existing local CIPs.	Need certainty that grant will still be in place when development takes place – once approved, guarantee the incentive for the life of the project.	Not supported. Creates uncertainty for private sector and administrative challenges for public sector. Ideally, local municipalities would utilize a similar grant schedule, but this would require amendments to existing local CIPs.
6.1.2 b) Pre-determined Regional tax increment grant schedule for brownfield redevelopment projects.	Generally supported, but increase base amount for brownfield projects to 80%.	Same as 6.1.2 a) above.	Same as 6.1.2 a) above.	Brownfields are higher priority than Smart Growth design criteria.	Same s 6.1.2 a) above.

Table E-1 Summary of Workshop Group Comments on Preliminary Incentive Program Concepts (Continued)

Preliminary Incentive Program Concept	Workshop Group				Other Comments
	1	2	3	4	
REVISIONS TO EXISTING PROGRAMS					
6.1.3 Building Improvement and Façade Improvement Grant Program					
6.1.3 a) Increase matching grant available from Region from the current \$5K per property to \$10K per property.	Strongly supported.	Supported	Supported.	Strongly supported.	Supported.
6.1.3 b) Clarify that Region’s existing grant /loan program applies to both façade improvement and building improvement and the entire grant/loan amount can be used for façade and/or building improvements	Generally supported. Recommend increasing façade grant available for side and rear façade improvements that face open space or parking. If possible, façade grant should be tied to façade frontage or square footage (preferable).	Do not provide grant for renovation unless a comprehensive project beyond façade improvement. Combine with heritage grants. Do not require registration on title or include a time limit.	Supported. Clarify that mixed use buildings are also eligible.	Recommend increasing façade grant available for designated heritage buildings. Ensure no interest loan is still available. Separate façade .vs. interior improvements.	Supported. Address side and rear façade improvements that face a street, open space, parking or a pedestrian lane.
6.1.3 c) Require that all projects taking advantage of this grant/loan conform to either applicable local design guidelines or the Region’s Model Urban Design Guidelines.	Supported.		Supported. Need to ensure local design guidelines are up-to-date and aligned with the Regional Model Design Guidelines.		Supported.
6.1.3 d) Allow upfront funding of some projects and introduce criteria to guide upfront funding where the project meets said criteria and the local municipality is also providing upfront funding.	Generally supported, but only if criteria in place. Suggested that an encumbrance be registered on title if a municipality wishes to provide funding before a project is complete.		Challenge is how to ensure project completion.		Not necessary. Ensuring project completion maybe a problem.
6.1.4 Residential Grant/Loan Program					
6.1.4 a) Increase matching grant available from Region from the current \$5K per unit to \$7.5K per unit.	Supported.		Generally supported, but: funding may be an issue; may need to target program geographically to downtowns	Supported. Ensure loan is still available.	Strongly supported. Could be increased even more.
6.1.5 Heritage Restoration and Improvement Grant/Loan Program					
6.1.5 a) Increase matching grant/loan available from Region from \$2.5K to \$5K for residential properties and from \$10K to \$15K for industrial/commercial properties.	Supported.		Training on proper restoration techniques is required.	Supported.	
6.1.5 b) Add properties designated under Part V of the Ontario Heritage Act as eligible properties.	Supported.		Not supported. Too broad. Should be property specific. Link to O. Reg 906.	Supported.	
6.1.5 c) Better promote existing Heritage Properties Tax Reduction Program to local municipalities but revise the program criteria so that only properties that have taken advantage of the Region’s Heritage Restoration and Improvement Grant/Loan are eligible for the Heritage Properties Tax Reduction Program	Generally supported, but still not sure local municipalities will use the Heritage Properties Tax Reduction Program.		Generally supported, but link to improvement of property. View as an “investment” rather than as a “gift”.	Supported.	

Table E-1 Summary of Workshop Group Comments on Preliminary Incentive Program Concepts (Continued)

Preliminary Incentive Program Concept	Workshop Group				Other Comments
	1	2	3	4	
REVISIONS TO EXISTING PROGRAMS					
6.1.6 Environmental Assessment Study Grant Program					
6.1.6 a) Phase out the program and shift funding to other programs that support brownfield redevelopment.	Supported as this is not a large incentive and ESA costs can be fully recovered under the Property Rehabilitation and Redevelopment Tax Increment Grant Funding Program.		Supported as long as ESA costs remain eligible under the Property Rehabilitation and Redevelopment Tax Increment Grant Funding Program.	Supported. Current program is cumbersome and does not provide enough funding.	A Local Municipality requested retention of program as it may be very useful in future and represents a minimal impact on the Regional Smarter Niagara Incentive Program budget.
6.1.7 Public Domain Incentives Program					
6.1.7 a) Require that a certain percentage of available funding be provided to projects that incorporate heritage and/or public art components.			Need clear link to Culture Plan. Focus more on public space. Build criteria into other programs. Ensure public projects use design guidelines.	Focus on heritage component.	Not supported as it could disadvantage certain local municipalities.
6.1.7 b) Create a separately funded program category that is available exclusively for heritage and/or public art themed projects.			Same as 6.1.7 a) above.		Not supported as it could disadvantage certain local municipalities.
6.1.7 c) Increase the minimum 6% green component cost to 10%.	Some support, but 10% may not be realistic in a downtown or built up urban area.		Same as 6.1.7 a) above.		

Table E-1 Summary of Workshop Group Comments on Preliminary Incentive Program Concepts (Continued)

Preliminary Incentive Program Concept	Workshop Group				Other Comments
	1	2	3	4	
PROPOSED NEW PROGRAMS					
6.2.1 Affordable Housing Grant Program					
A matching grant program for affordable housing that provides a Regional grant of up to \$7.5K per unit and a maximum of 20 units per property.	Generally supported, but “affordability (price of unit and eligibility of purchaser) must be defined.	Some support, but: program should be focused on “need” rather than market; may work better for multiple units; perhaps affordable housing should be a social housing program and not a CIP based incentive.	Some support, but “affordability threshold must be defined and program should focus on rental units.	Supported. Ensure this program applies to renovations in addition to new construction. Increase Regional funding amount from \$7.5K per unit to \$12.5K per unit for registered charitable organizations.	May present funding and administrative challenges for local municipalities. Could this be a non-matching program?
6.2.2 Regional Development Charge Deferral Program for Affordable Housing					
Defer the payment of Regional DCs on affordable housing projects until the unit is sold or within a set period of time.	Not supported. Program is not viewed as necessary, especially since Regional DCs for residential not that large.		Not supported due to administrative issues and DCs are addressed under other programs.	Support, but consider use of a third mortgage.	
6.2.3 Agricultural Feasibility Study Grant					
A matching grant program for agricultural feasibility studies that provides a Regional grant of up to \$7,500 per study.	Supported. Program is important for agricultural municipalities. Must also be supported at Regional and local level with policies that protect and support agriculture.	Excellent concept. Strong support. Consult with agricultural community.	Generally supported, but: lower priority; link to agri-tourism; urban focus.	Great idea. Strong support. Important for rural Niagara.	Question how valuable this program would be? Local municipalities may not have enough funding to participate.
6.2.4 Agricultural Buildings and Facilities Revitalization Grant					
A matching tax increment based grant for up to 10 years for projects that improve agricultural properties and result in a property tax increase.	Same as 6.2.3 above.	Excellent concept. Strong support. Consider extending to activities that support transition of agricultural areas, e.g., biofuels, local food production. Consult with agricultural community.	Same as 6.2.3 above.	Same as 6.2.3 above. Include costs of replanting new crops as an eligible cost.	Same as 6.2.3 above.
6.2.5 Direct and Separate Funding for Cultural Heritage and Arts Projects					
Provide direct funding for cultural and heritage projects to address the program needs of cultural heritage groups.	Supported.	More information needed.	Link to Culture Plan. Link to local CIPs.	More information needed.	

APPENDIX F

Administrative Guidelines for the Smarter Niagara Incentive Programs

F-1 Regional Development Charge Reduction Program

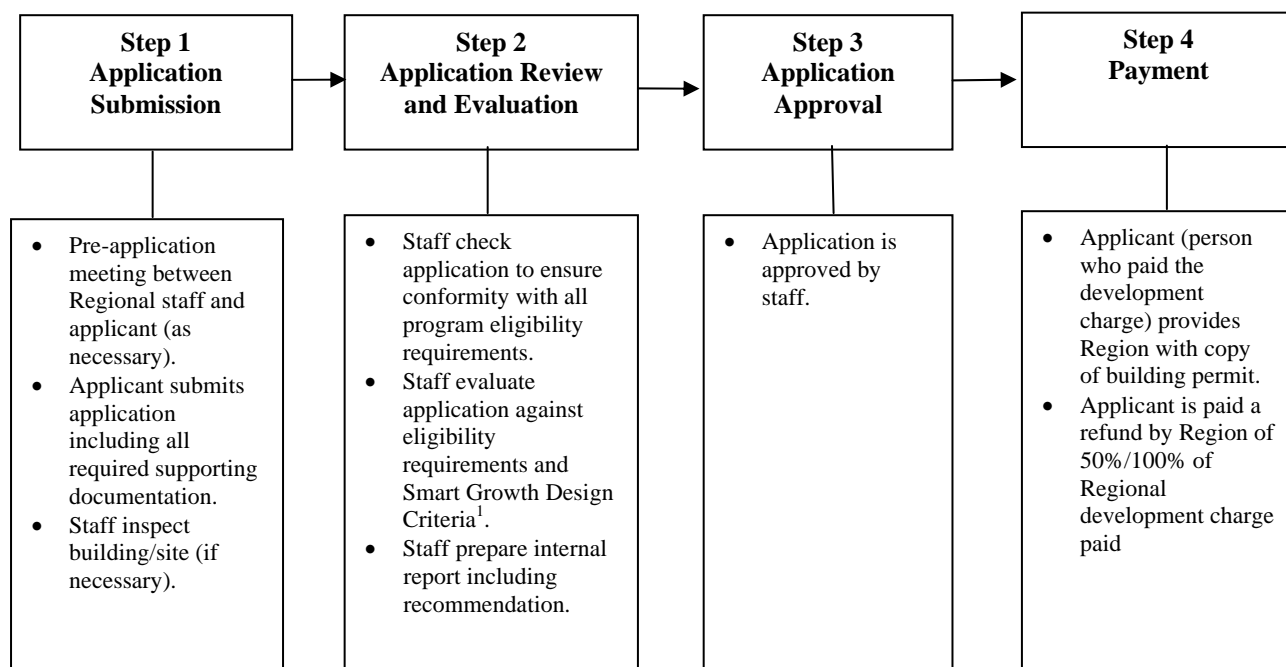
The Regional Development Charge Reduction Program is currently administered via direct application to the Region. The administration of this program is outlined in **Figure F-1** below.

The program application form specifies that the Development Charge Reduction is paid as a refund of the Regional development charges that are paid at the time of building permit issuance. However, review of Regional Development Charges By-law No. 62-2009 (Section 15) indicates that the Region could offer the development charge reduction as a reduction of the development charge payable to be paid at the time of building permit issuance rather than as a refund. This approach would be workable for those projects simply seeking the 50% development charge reduction because they are located within a designated central urban area or on a brownfield. However, a refund may have to be utilized for those projects seeking the additional 50% development charge reduction for inclusion of Smart Growth Design Criteria because evaluation of the project against the Region's Smart Growth Design Criteria is usually best made once the development project is complete.

Based on the recommendations contained in this report, the following revisions should be made to the program:

- a) Make brownfield sites that are being redeveloped for industrial use outside downtowns eligible for the program;
- b) Develop and apply new Smart Growth Design Criteria that are clearer and more complete;
- c) If the project is on a brownfield site and in a designated central urban area, provide a 75% reduction of the Regional Development Charges payable rather than the current 50%

Figure F-1 Regional Development Charge Reduction Program Administration



Notes:

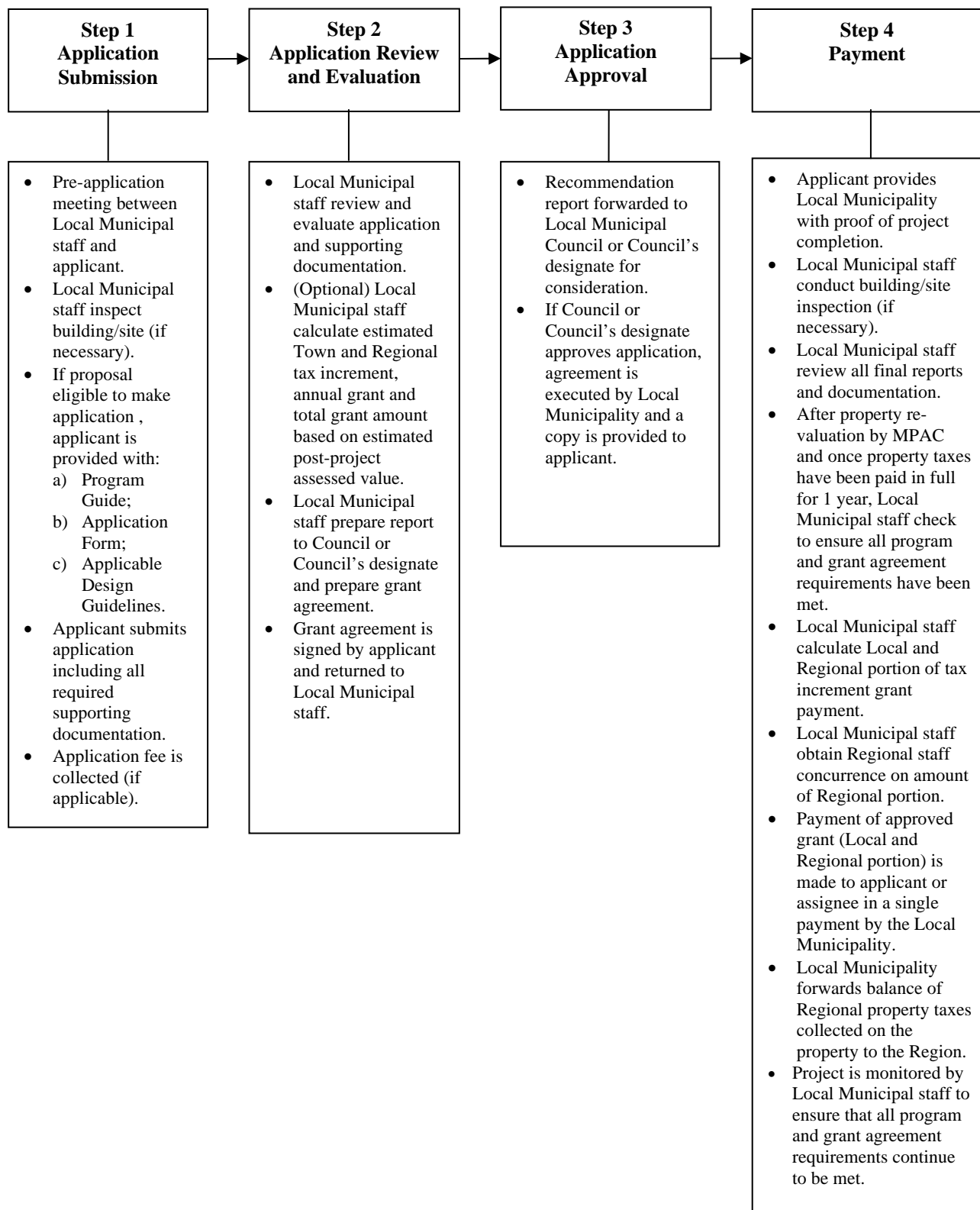
1. Region will determine whether it will allow pre-qualified professionals to certify that a project incorporates the Region's new Smart Growth Design Criteria or whether Region will continue to rely on Regional staff review.

F-2 Property Rehabilitation and Redevelopment Tax Increment Funding Program

The Property Rehabilitation and Redevelopment Tax Increment Funding Program is administered by the Local Municipalities. The general administration of this program is outlined in **Figure F-2** below. This program will continue to be administered by the Local Municipalities as shown in Figure F-2, with the following recommended program revisions:

- a) The Region will continue to match the percentage and duration of any local property rehabilitation and redevelopment tax increment grant paid by the local municipality, but if the project is a brownfield redevelopment project, affordable housing project, or it conforms to the Region's Smart Growth design criteria, it will receive a minimum 75% Regional Property Rehabilitation and Redevelopment Tax Increment Grant;
- b) Local Municipal staff will notify Regional staff of the annual amount of the Regional tax increment grant and obtain Regional staff concurrence on the amount;
- c) When the Local Municipality collects the annual property taxes, the Local Municipality will retain the Regional tax increment grant amount and provide a single payment to the successful applicant of the Local/Regional tax increment grant; and,
- d) The Local Municipality will forward the balance of the Regional property taxes collected on that property to the Region as normal.

Figure F-2 Property Rehabilitation and Redevelopment Tax Increment Funding Program Administration

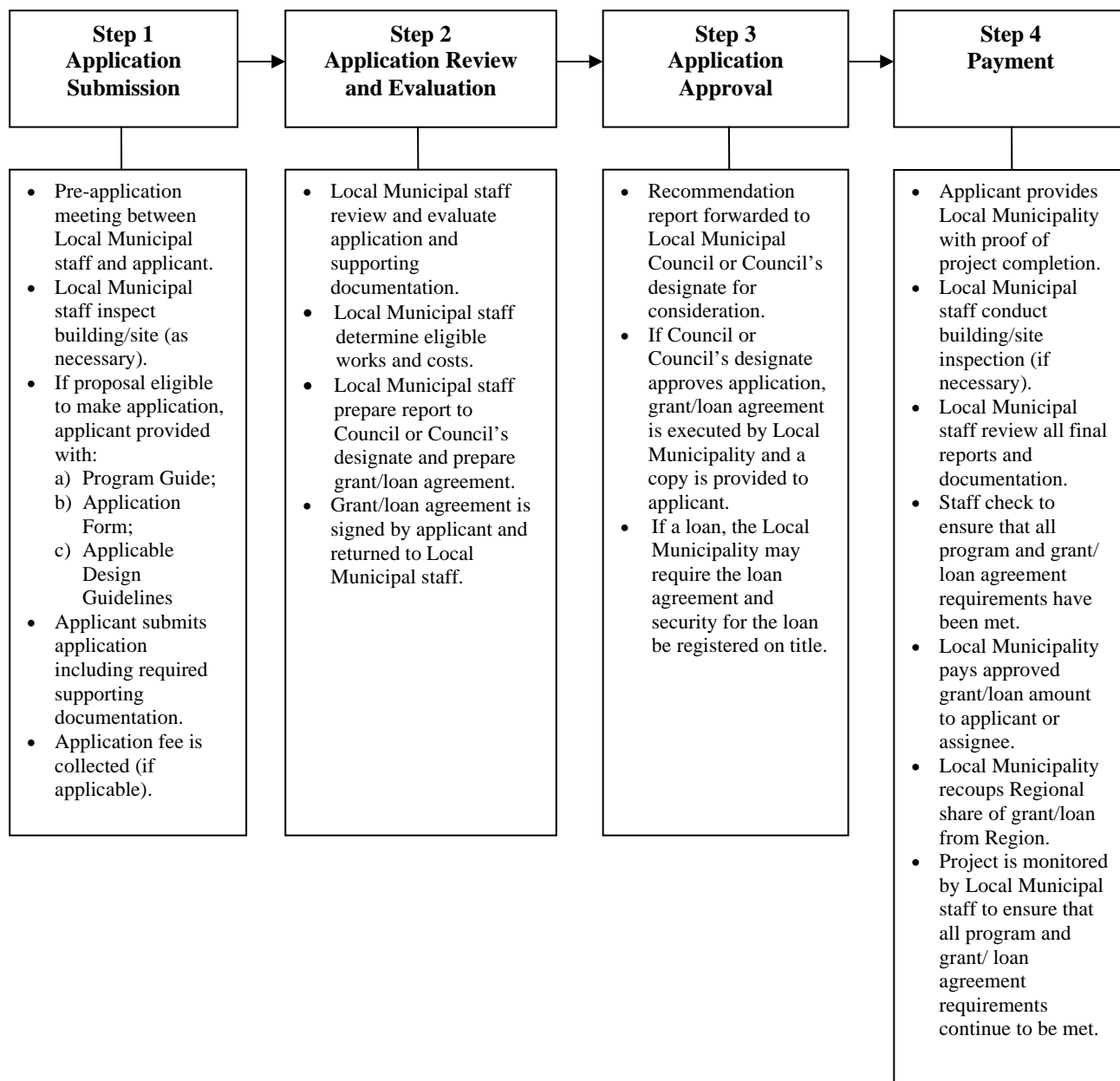


F-3 Building and Façade Improvement Grant/Loan Program

The Building and Façade Improvement Grant/Loan Program is administered by the Local Municipalities. The general administration of this program is outlined in **Figure F-3** below. Most Local Municipalities have separate programs for façade improvement (usually a grant) and building improvement (grant or loan). This program will continue to be administered by the Local Municipalities as shown in Figure F-3, with the following recommended program revisions:

- a) The grant/loan available from the Region is available for both façade improvement and building improvement and the grant/loan can be used for either or both, subject to the maximum Regional program funding contribution limits;
- b) The Region will increase the matching grant available from the Region for front façade improvement and/or building improvement to \$10,000 per property;
- c) The Region will introduce a matching grant/loan from the Region for side and/or rear façade improvement of up to \$10,000 per property;
- d) The Region will require that all façade improvements taking advantage of this Regional grant/loan program conform to Local Municipal urban design guidelines that are aligned with the Region's Model Urban Design Guidelines, or alternatively, the Region's Model Urban Design Guidelines.

Figure F-3 Building and Facade Improvement Grant/Loan Program Administration

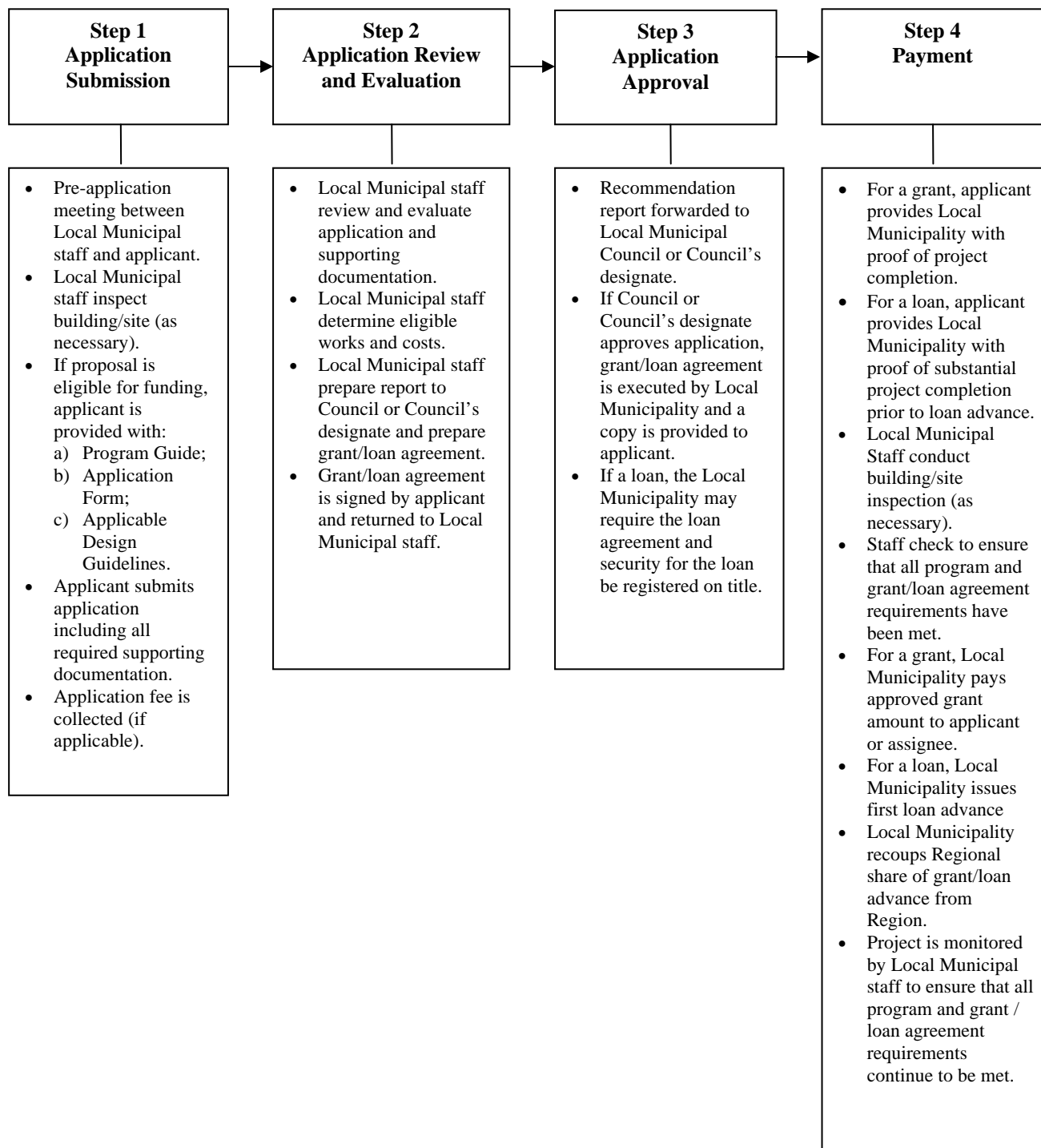


F-4 Residential Grant/Loan Program

The Residential Grant/Loan Program is administered by the Local Municipalities. The general administration of this program is outlined in **Figure F-4** below. This program will continue to be administered by the Local Municipalities as shown in Figure F-4 with the following recommended program revisions:

- a) The Region will increase the matching grant available from the Region to \$7,500 per unit.

Figure F-4 Residential Grant/Loan Program Administration

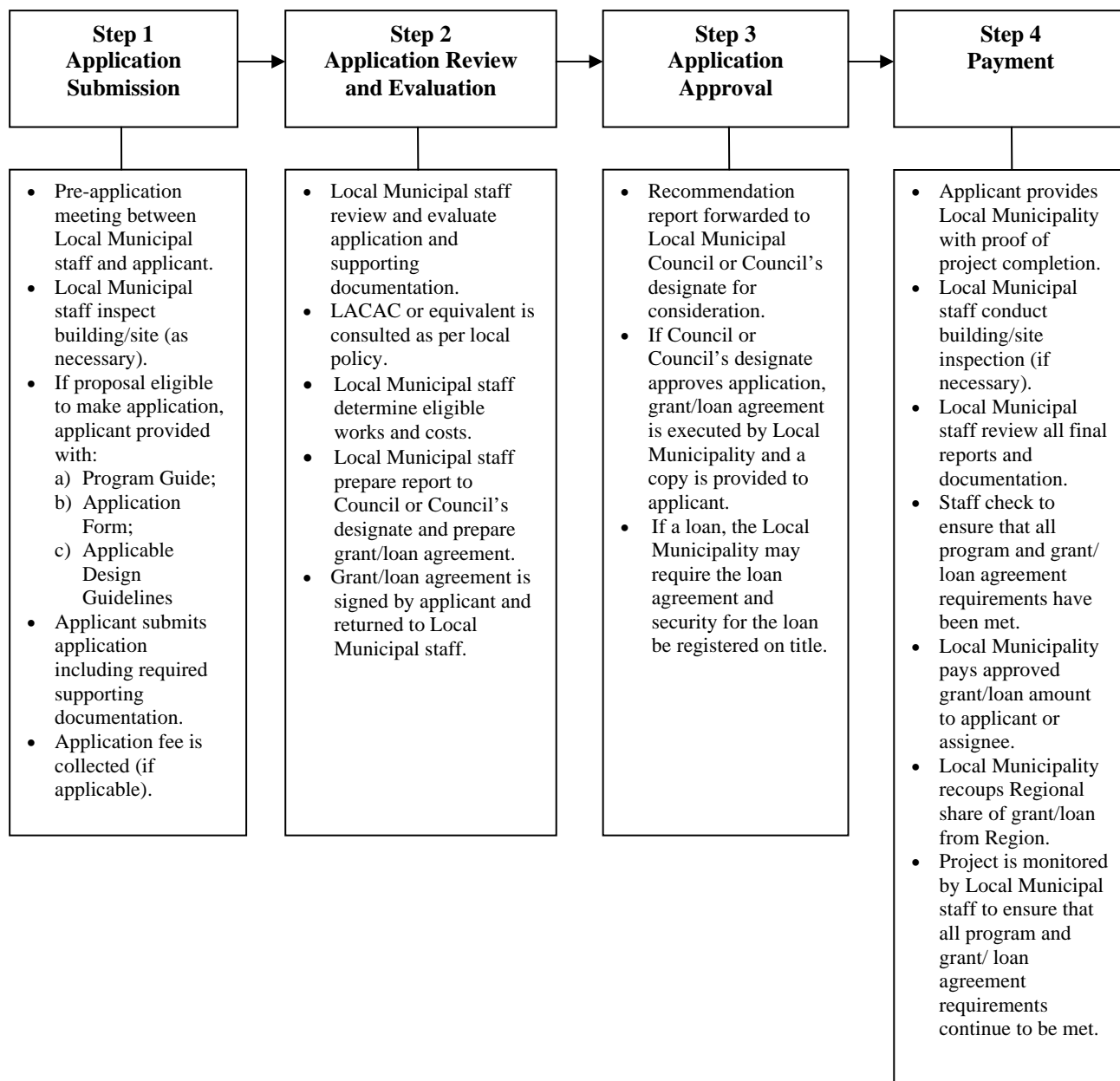


F-5 Heritage Restoration and Improvement Grant/Loan Program

The Heritage Restoration and Improvement Grant/Loan Program is administered by the Local Municipalities. The general administration of this program is outlined in **Figure F-5** below. This program will continue to be administered by the Local Municipalities as shown in Figure F-5 with the following recommended program revisions:

- a) The Region will increase the matching grant/loan available from the Region for designated residential properties to \$5,000 and for designated industrial/commercial properties to \$15,000;
- b) The Region will add as eligible for this program properties that are included within the boundary of a heritage conservation district designated under Part V of the Ontario Heritage Act.

Figure F-5 Heritage Restoration and Improvement Grant/Loan Program Administration

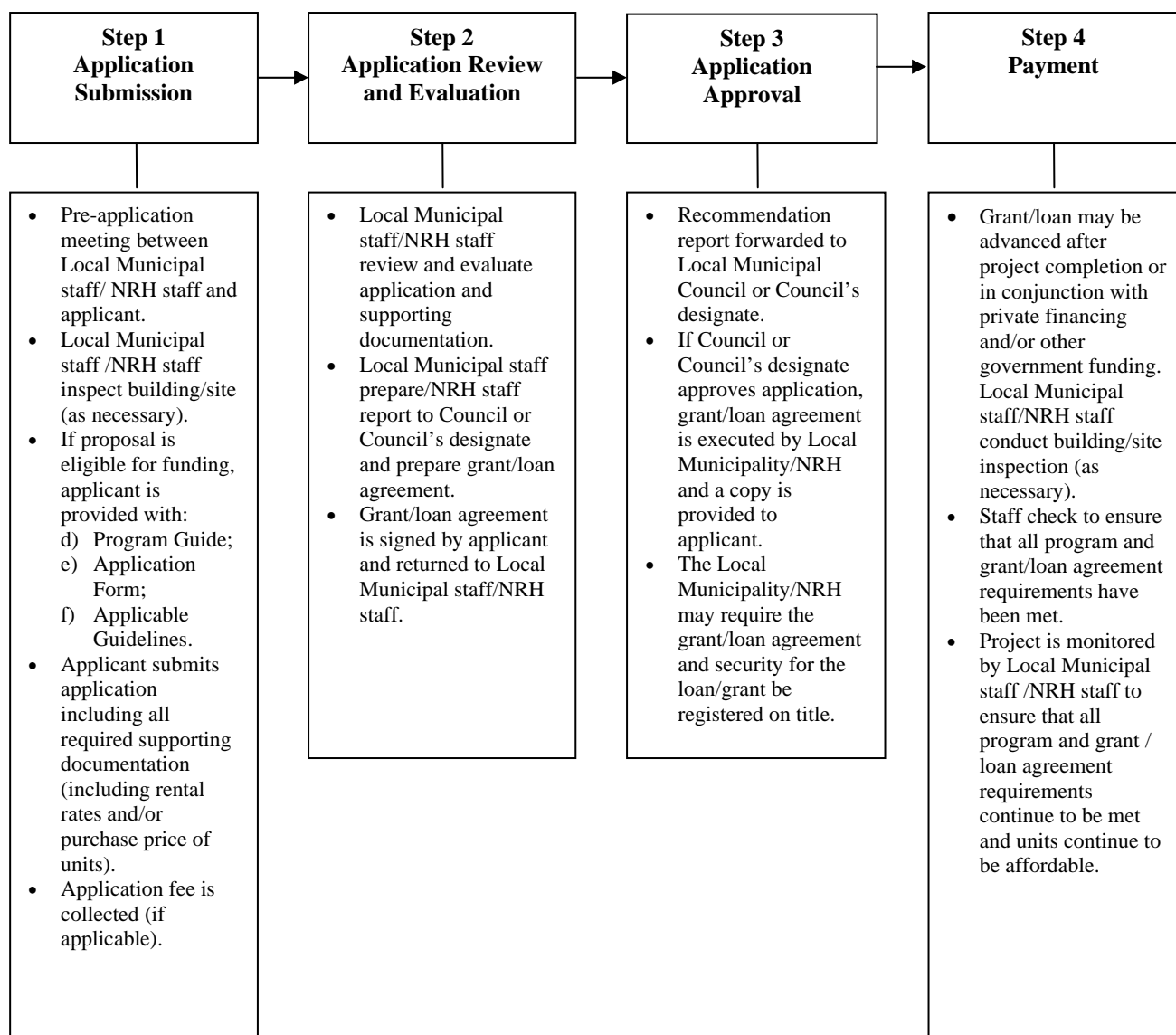


F-6 Affordable Housing Grant/Loan Program

The Affordable Housing Grant/Loan Program is a new program that will be administered by Niagara Regional Housing and/or the Local Municipalities. This grant/loan program would provide a matching Regional grant or loan for construction of new or renovation of existing residential units for affordable housing. This grant or loan would work on the same basis as the existing Residential Grant/Loan Program (matching contribution from Local Municipality) with a maximum Regional grant or loan of \$7,500 per unit and maximum of 20 units per property. This program would be funded through a Regional Affordable Housing Reserve Fund. This grant would be available in addition to the existing Residential Grant/Loan.

The general administration of this program is outlined in **Figure F-6** below. However, the details of this program, including the program definition of “affordability”, the specific mechanism to be utilized to ensure that units remain affordable, and detailed program administrative procedures, will be developed in consultation with Niagara Regional Housing and the Local Municipalities.

Figure F-6 Affordable Housing Grant/Loan Program Administration



F-7 Agricultural Feasibility Study Grant Program

The Agricultural Feasibility Study Grant Program is a new program that will be administered by the Local Municipalities. This grant program will provide a matching Regional grant up to \$7,500 for studies that determine if existing agricultural/rural buildings and facilities can be converted or adapted to specialty in-demand agricultural or agri-tourism uses, as well as business plans for new agriculture and agriculture related uses. Eligible studies include but are not limited to:

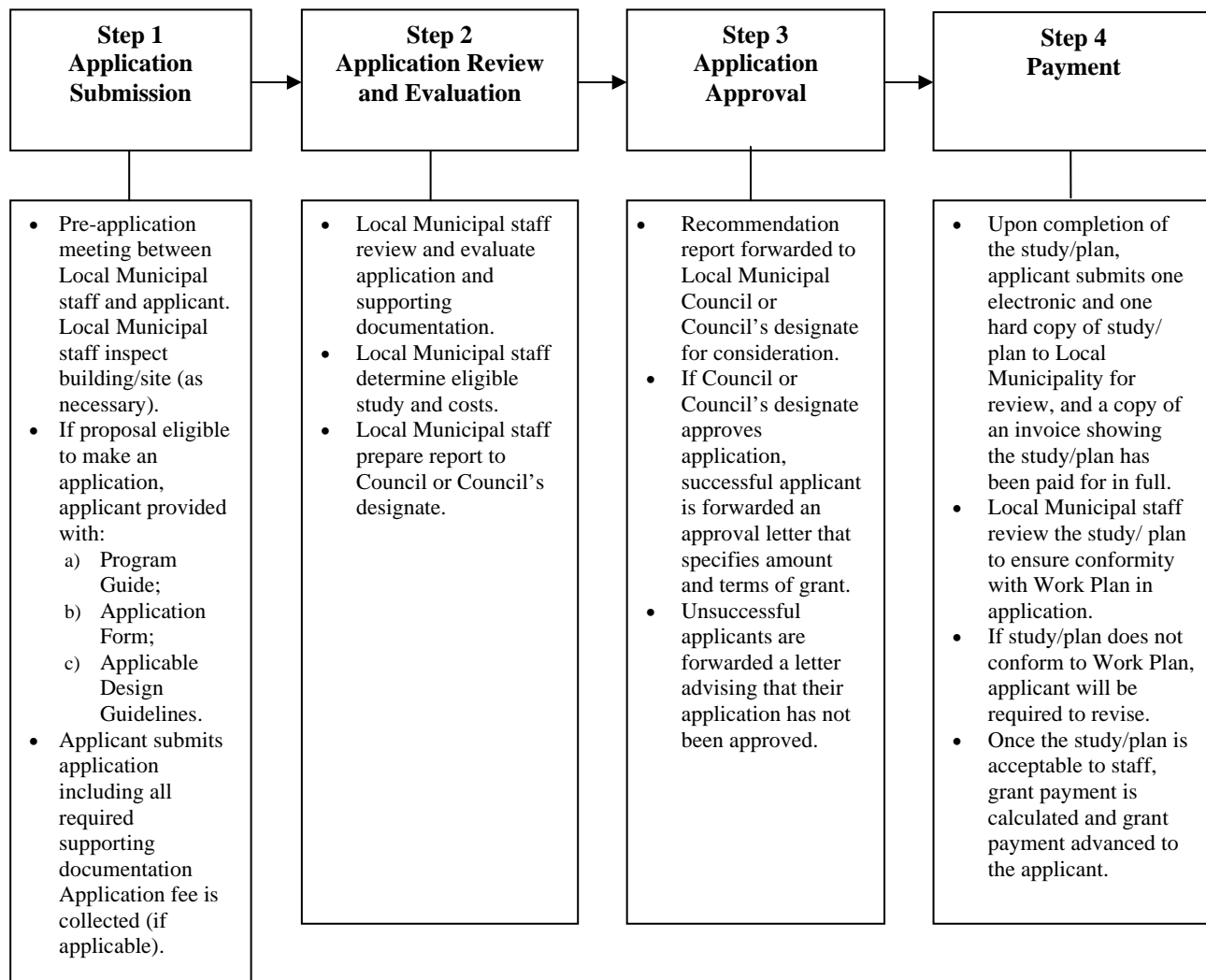
- a) structural analyses;
- b) evaluation of existing and proposed mechanical, electrical and other building systems;
- c) concept plans;
- d) market analyses;
- e) business plans; and,
- f) other feasibility study as approved by the Local Municipality.

The feasibility study must provide significant information with respect to one or more aspects of the structural/engineering feasibility of the project and associated costing, conceptual feasibility, and/or the market/economic feasibility of the project.

The general administration of this program is outlined in **Figure F-7** below.

Implementation of this program will require that participating Local Municipalities prepare an Agricultural CIP that contains this program or a comprehensive/multi-purpose CIP that contains this program, or that the Region prepare a Master CIP that contains this program and that participating Local Municipalities adopt this Master CIP.

Figure F-7 Agricultural Feasibility Study Grant Program Administration



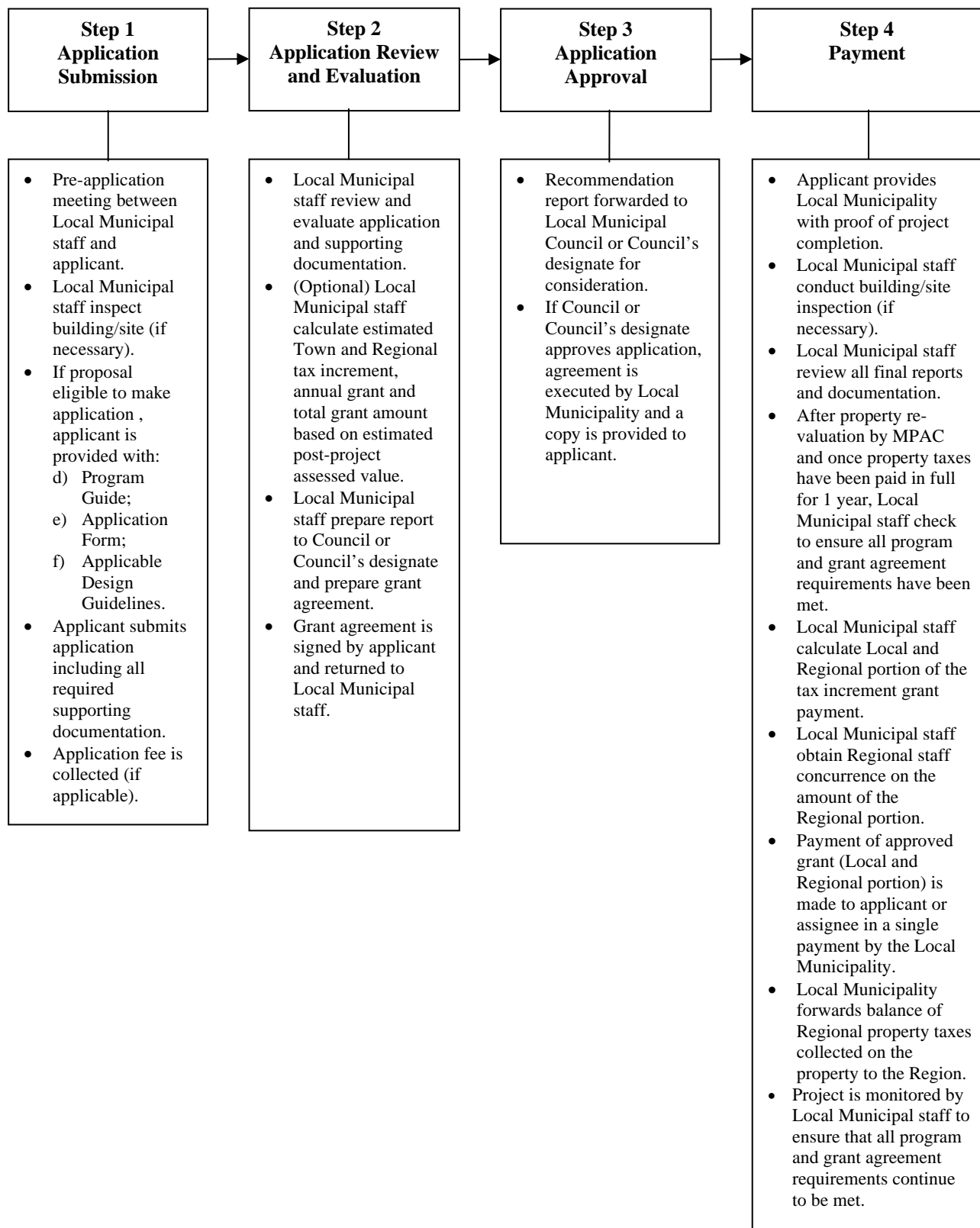
F-8 Agricultural Buildings and Facilities Revitalization Grant Program

The Agricultural Buildings and Facilities Revitalization Grant Program is a new program that will be administered by the Local Municipalities. This grant program will provide a matching tax increment based grant for up to ten (10) years similar to the Property Rehabilitation and Redevelopment Tax Increment Funding Program Grant Program. The Agricultural Buildings and Facilities Revitalization Grant will apply to physical improvements to existing agricultural properties, buildings and facilities that promote farm building rehabilitation, conversion to bio-fuels, new forms of agriculture, and value added secondary production in agricultural areas. The eligible activity must result in an increase in assessment value, and therefore property taxes.

The general administration of this program is outlined in **Figure F-** below.

Implementation of this program will require that participating Local Municipalities prepare an Agricultural CIP that contains this program or a comprehensive/multi-purpose CIP that contains this program, or that the Region prepare a master level CIP that contains this program and that participating Local Municipalities can adopt.

Figure F-8 Agricultural Buildings and Facilities Revitalization Grant Program Administration



MEMORANDUM

CL-C 28-2019

Subject: Request for Appointment to the Waste Management Planning Steering Committee

Date: April 25, 2019

To: Regional Council

From: Ann-Marie Norio, Regional Clerk

The Office of the Regional Clerk has received a request from Councillor Edgar for membership on the Waste Management Planning Steering Committee.

The Committee can have up to eight (8) members of Regional Council. Currently there are eight (8) members: Councillors Bellows, Butters, Diodati, Fertich, Gale, Rigby, Ugulini and Witteveen.

In order to appoint Councillor Edgar to the Committee, the Terms of Reference for the Waste Management Planning Steering Committee would need to be amended to include representation from nine (9) members of Regional Council.

Should Council be in favour of the request, the following motion would be required:

That Councillor Edgar **BE APPOINTED** to the Waste Management Planning Steering Committee; and

That the Waste Management Planning Steering Committee Terms of Reference **BE AMENDED** to provide for representation from nine (9) members of Regional Council.

Respectfully submitted and signed by

Ann-Marie Norio
Regional Clerk

MEMORANDUM

CL-C 34-2019

Subject: Standing Committee Appointment

Date: April 25, 2019

To: Regional Council

From: Ann-Marie Norio, Regional Clerk

On Sunday, April 21, 2019, the Clerk's Office received a request from Councillor Ip asking to be appointed to the Public Works Committee.

In accordance with By-law 35-2014, a by-law to establish Standing Committees, a member of Regional Council shall be appointed to a Standing Committee by resolution of Council.

The following motion is before Council for consideration.

That, effective immediately, Councillor Ip **BE APPOINTED** to the Public Works Committee.

Respectfully submitted and signed by

Ann-Marie Norio
Regional Clerk

Minute Item No. 6.1

CAO 3-2019

Shape Niagara - Council Strategic Planning

That Report CAO 3-2019, dated April 4, 2019, respecting Shape Niagara - Council Strategic Planning, **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That Report CAO 3-2019 outlining the process for developing the 2019-2022 Council Strategic Plan, and which includes the Shape Niagara environmental scan reports “What We’ve Heard” and “Setting the Stage for Strategy”, as well as the departmental SWOT Analysis, **BE RECEIVED**.

Minute Item No. 6.2

COTW-C 03-2019

Shape Niagara - Council Strategic Planning Workshop

That Correspondence Item COTW-C 03-2019, being a memorandum from Regional Chair Bradley, dated April 4, 2019, respecting Shape Niagara - Council Strategic Planning Workshop, **BE RECEIVED**.

**THE REGIONAL MUNICIPALITY OF NIAGARA
COMMITTEE OF THE WHOLE
MINUTES**

**COTW 02-2019
Thursday, April 4, 2019
Council Chamber
Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON**

Committee: Bradley (Regional Chair), Bylsma, Chiocchio, Darte, Disero, Easton, Edgar, Fertich, Gale, Gibson, Greenwood, Heit, Huson, Ip, Junkin, Insinna, Nicholson, Redekop, Rigby, Steele, Ugulini, Villella, Whalen, Witteveen, Zalepa

Absent/Regrets: Bellows, Butters, Campion, Diodati, Foster, Jordan, Sendzik

Staff: D. Barnhart, Communications Consultant, H. Chamberlain, Director, Financial Management & Planning/Deputy Treasurer, D. Giles, Director, Community & Long Range Planning, T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, Dr. M. Hirji, Acting Medical Officer of Health, A. Jugley, Commissioner, Community Services, M. Jurczyk, Director, Internal Controls & Organizational Performance, V. Kuhns, Acting Director, Economic Development, A.-M. Norio, Regional Clerk, R. Tripp, Acting Chief Administrative Officer

1. CALL TO ORDER

Regional Chair Bradley called the meeting to order at 6:33 p.m.

2. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

3. PRESENTATIONS

3.1 Shape Niagara - Overview

3.1.1 What We Heard Report

Kristen Delong, Manager, and Sandy Dupuis, Corporate Performance Specialist, Internal Control and Organizational Performance, appeared before the Committee to provide information respecting Shape Niagara - What We Heard.

Topics of the presentation included:

- Strategic Planning Process
- Community Consultation
- Methodology
- What Did We Ask the Community
- What We Heard
- Bringing it All Together

At this point in the meeting, Councillor Bylsma, Acting Regional Chair, assumed the chair.

3.1.2 Setting the Stage for Strategy Report & Strategic Planning Process

Kristen Delong, Manager, and Sandy Dupuis, Corporate Performance Specialist, Internal Control and Organizational Performance, appeared before the Committee to provide information respecting Shape Niagara - Setting the Stage for Strategy Report and Strategic Planning Process. Topics of the presentation included:

- Overview
- Methodology
- Global Trends
- National Trends
- Provincial Trends
- What's Happening in Niagara?
- Setting the Stage for Strategy
- Aligning Regional Services

3.2 Niagara Region Service Sustainability Review

Oscar Poloni, Office Managing Partner, KPMG, provided Committee with information respecting Niagara Region Service Sustainability Review.

Topics of the presentation included:

- Scope of Review
- Identifying Opportunities
- Initial Perspectives
- Council's Involvement

Councillor Information Request(s):

Provide information respecting where the commercial taxation rate is competitively with comparator municipalities. Councillor Zalepa.

4. DELEGATIONS

There were no delegations.

5. ITEMS FOR CONSIDERATION

There were no items for consideration.

6. CONSENT ITEMS FOR INFORMATION

6.1 CAO 3-2019

Shape Niagara - Council Strategic Planning

Moved by Councillor Ugulini

Seconded by Councillor Zalepa

That Report CAO 3-2019, dated April 4, 2019, respecting Shape Niagara - Council Strategic Planning, **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That Report CAO 3-2019 outlining the process for developing the 2019-2022 Council Strategic Plan, and which includes the Shape Niagara environmental scan reports "What We've Heard" and "Setting the Stage for Strategy", as well as the departmental SWOT Analysis, **BE RECEIVED**.

Carried

Councillor Information Request(s):

Provide the finalized strategic plan in a format that can be shared with the local area municipalities and constituents. Councillor Zalepa.

6.2 COTW-C 03-2019

Shape Niagara - Council Strategic Planning Workshop

Moved by Councillor Huson

Seconded by Councillor Nicholson

That Correspondence Item COTW-C 03-2019, being a memorandum from Regional Chair Bradley, dated April 4, 2019, respecting Shape Niagara - Council Strategic Planning Workshop, **BE RECEIVED**.

Carried

7. OTHER BUSINESS

7.1 Provincial Review of Regional Government

Councillor Fertich advised he wanted to provide a notice of motion respecting the creation of a governance review committee to provide options respecting the review being conducted by the Province. Ann-Marie Norio, Regional Clerk, advised that in accordance with the Procedural By-law, a notice of motion could only be presented at a Council meeting or provided to the Clerk not less than seven days prior to the date of the meeting that the motion would be introduced at. Councillor Fertich advised he would bring forward his motion at the Regional Council meeting being held on April 25, 2019.

8. NEXT MEETING

The next meeting is scheduled for Thursday, April 11, 2019 at 6:30 p.m. in the Council Chamber.

9. ADJOURNMENT

There being no further business, the meeting adjourned at 8:24 p.m.

Jim Bradley
Regional Chair

Ann-Marie Norio
Regional Clerk



SHAPE NIAGARA

WHAT WE
HEARD

Presentation 1

Shape Niagara Overview & *What We Heard* Report

Presentation 2

*Setting the Stage for Strategy Report
& Strategic Planning Process*

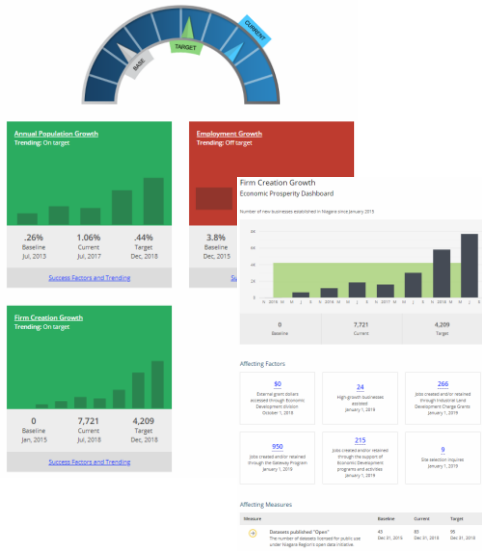
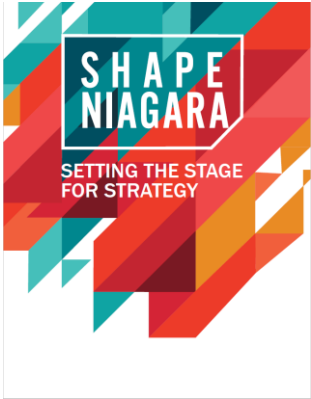
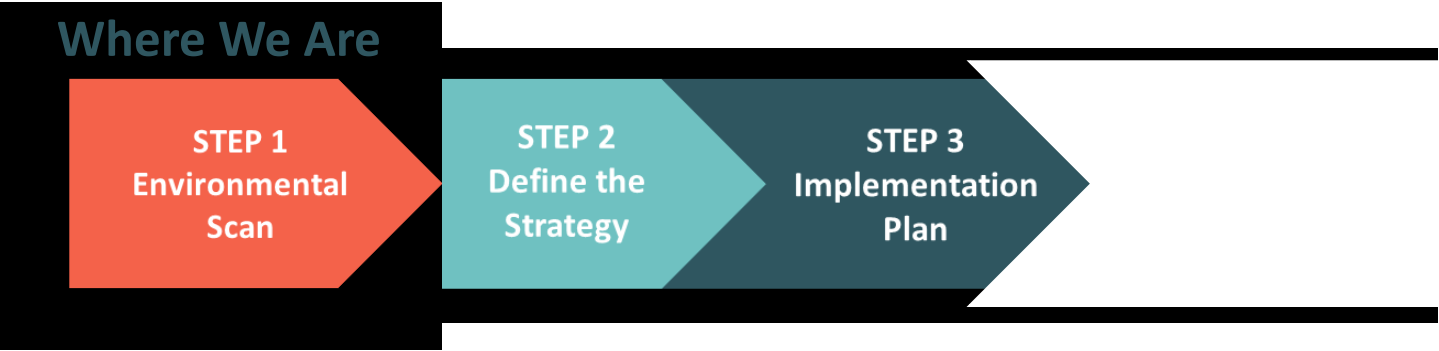
Shape Niagara Overview

What is Shape Niagara?



- A municipal strategic plan is the basis for aligning the work of the organization with the priorities of Council
- Staff typically prepares a background study to provide Council a comprehensive collection of information to inform the development of the new strategic plan
 - Community Engagement – what the community has prioritized
 - Environmental Scan – current state and influencing factors
- These reports will serve to inform Council in the development of the 2019-2022 Council strategic plan

Strategic Planning Process



What We've Heard Report

Community Consultation Timeline




Reach




ONLINE SURVEY
1002 Survey Responses

 **Other Relevant Surveys**

 **COMMUNITY EVENTS**
 **28** Community Events
.....
 **85** Unique Quotes
.....
Approximately **1500** in-person interactions

PUBLIC OPEN HOUSES
.....
5 OPEN HOUSES
70 PARTICIPANTS
173 UNIQUE QUOTES



1523
Total Participants

 **PARTNER SESSION**
 **70** PARTICIPANTS
.....
60 Partner Organizations : **16** Topic Areas
.....
8 Local Municipalities : **19** Business Sector
.....
10 Education Sector : **25** Non-Profit Sector
.....
8 Health Sector

What's in the *What We Heard* Report

- Project Overview
 - Objective of the initiative
- Community Engagement Overview
 - Why community engagement, how feedback was captured, what was done with feedback
- What We Heard
 - What we heard from the community, for each type of engagement by the six areas of focus
- Bringing it All Together
 - Merging everything from What We Heard to identify the priority themes as identified by the community

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Methodology

Data Analysis Process



What Did We Ask the Community

**Residents were asked to provide
3 words that best describe Niagara**



What can Niagara Region do to support...

Six Areas of Focus

Six areas of focus were identified to provide a means for data to be sorted and to gather context around feedback submitted.



Infrastructure and Services

Transportation, roads and bridges, waste, water, senior services, child and family services, housing and homelessness



Economy and Growth

Fostering an environment for jobs and prosperity, development supports.



Health and Wellness

Public health services, bike lanes
and pathways, ambulances and
emergency services



Governance and Advocacy

Proactive leadership, fiscal responsibility,
open government, advocacy for Niagara



Environment

Environmental protection,
driving sustainable development



Quality of Life

Safely, community planning, walkability,
engagement, newcomer supports

What We Heard

Here's What We Heard:



Infrastructure and Services

Roads and Bridges

- Improving road maintenance (new and existing)

Transportation Connectivity

- Expansion of GO trains coming into the region
- Improved public transit system functioning as a single system with one schedule and one fare

Affordable Housing

- More housing for seniors and affordable housing

Navigating Regional services

- Increasing accessibility of services across the region



Environment

Balancing Growth with Sustainable Development

- Concern for loss of greenspace and protecting the rural character of the Region
- Improved planning to match infrastructure with development and community needs



Economy and Growth

Economic Prosperity

- Niagara needs to be a place to not only live but to work in as well, with quality jobs to ensure Niagara is not a bedroom community for GTA and Hamilton
- Secure employment opportunities) Priority for the region is job creation, jobs for youth, and bringing jobs (with higher pay) to the region.



Governance and Advocacy

Fiscal Responsibility

- More accountable spending at the region and the municipalities

Collaboration

- Improved communication between the Region and LAMs with common goals

Community Engagement

- Ensuring more transparency in development plans for residents across all local municipalities



Health and Wellness

Health Care Services

- Improving and expanding mental health services for children and adults
- Increased support for Public Health Services

- Captured by categories to provide context
- Organized by who said it

What do you hope Niagara is known for in 10 years?

Niagara will be a thriving economic hub, with a focus on supporting local businesses, and actively recruiting new, diverse industries with a focus on secure and stable opportunities. Niagara will leverage our proximity to major cities in order to create a strong, prosperous economy.



Residents hope to see Niagara maintain its unique traits, focusing on celebrating history, protecting our environment and land assets, and further marketing our natural features. Niagara will leverage our ample greenspaces to increase eco-tourism and become a leader in green industry.



Niagara residents will feel a sense of belonging, and have a high level of engagement regarding local issues. Residents of Niagara will have their voices heard, and together we will shape Niagara into a community we are all proud of.



Niagara will be welcoming and inclusive for all, with superior services with ease of access for all ages and social status; including transportation, community and health services, and opportunities for leisure. Niagara will be an affordable place to live, attracting and supporting diversity.



Niagara will be a vibrant community with ample employment opportunities, allowing youth and young families to plant roots. Niagara will place an emphasis on ensuring urban amenities are available for residents, access to natural space, connectivity and a vibrant arts and culture scene.



Bringing It All Together

From the analysis of the feedback and data collected, 17 top themes were identified by Niagara's residents, businesses, organizations and local area municipalities. They have been summarized and presented in order of priority, beginning with the most frequently cited.

1 Jobs & Economic Prosperity

- Advocate for, and rebrand Niagara as a whole, create a clear vision in attracting new industry; market Niagara's strengths to attract business through various media channels
- Actively solicit businesses to locate in Niagara through incentives and supports; ensure this business growth is across a wide range of industry; attract businesses that provide non-precarious employment and socially responsible businesses
- Encourage economic growth in downtown cores, brownfields and municipalities that may not traditionally attract industry
- Support small businesses and entrepreneurs to help them thrive
- Use of local companies for Regional projects; i.e. Those hiring local talent
- Partner with community organizations, post-secondary institutions and the business community to strategize economic development opportunities
- Move away from investment in part-time, seasonal and low-paying employment, move towards secure jobs that pay a living wage
- Better understand the link between sustainability in the job market and quality of life of employees (i.e. health care, housing)
- Focus on diversifying our economic clusters (away from tourism and service industries) and shift towards emerging industries, or those with proven longevity (i.e. health, technology)
- Work to consolidate economic focus and drivers across all local municipalities to better refine our economic strategic planning
- Work to ensure all necessary supports are in place to foster an environment for economic prosperity and success through streamlined processes, right-sized taxes, smart incentives directed towards results

2 Transportation Connecting People to Jobs & Services

- Recognize and promote secondary benefits that come with a unified transit system; improved access to health care, improved access to job opportunities across municipalities, reduction in greenhouse gas emissions, improved social engagement and reduction in congestion on major arteries
- Continue with the creation of a comprehensive inter-municipal transit system, integrated with the future GO route
- Ensure current and future transit is accessible, frequent and affordable, routes and schedules matched to needs of users
- Explore transportation alternatives, beyond buses, such as high-speed inter-city rail, ferry services and increasing usage of Niagara's airport

3 Supporting Populations in Need through Employment, Affordable Housing, Transit

- Support populations in need by ensuring necessary services are provided including affordable housing and transportation options, that services such as health care are accessible and that affordable housing needs of the community are met
- Adapt services to meet the needs of Niagara's aging population
- Innovative solutions to address homelessness, unemployment, and addictions
- Populations in need as identified by respondents include seniors, homeless, new residents, immigrants, those experiencing addictions, and vulnerable / marginalized

4 Environmental Responsibility & Sustainable Development

- Environmental protection and sustainable development go hand in hand
- Protect Niagara's greenspace, greenbelt lands, farmland, wetlands by reducing development or sprawl on these lands
- Ensure future developments are sustainable by building on brownfields rather than greenfields; more stringent rules for developers that plan to build on sensitive land; offer incentives and prioritization for developers that are repurposing current vacant land, and to developers that are passionate about preserving our heritage
- Be visionary in response to growth for land-use planning across Niagara, ensuring planning policies and approvals protect Niagara's natural assets and are tied to resident's needs and feedback

5 Accountable & Collaborative Government

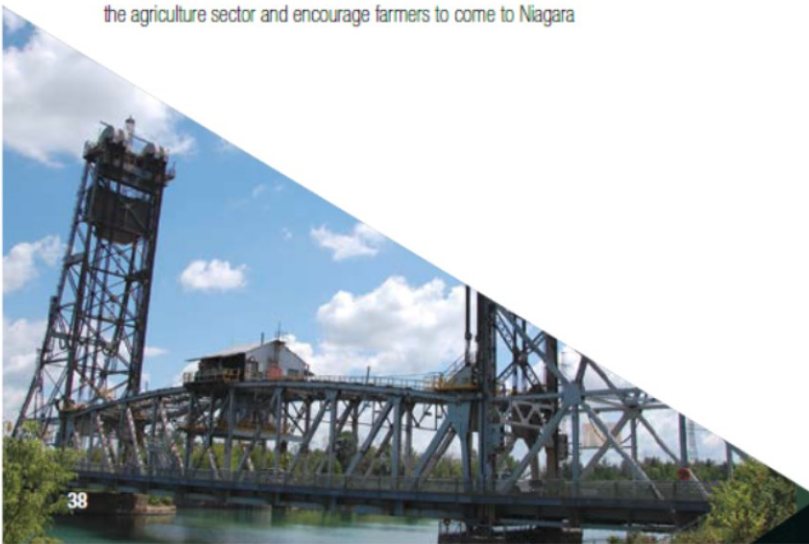
- Better collaboration between levels of government, Niagara's needs are best met through a common vision; working together with lower-tier municipalities to create a defined strategic focus for key industries (i.e. economic growth, tourism)
- Continue to advocate for Niagara's needs to upper levels of government, all municipalities advocating together as one, for the needs of Niagara as a whole
- Improve representation of resident needs by ensuring Councillors do not allow partisanship or professional interests to guide decision making
- Work to repair relationship with media and press; restore credibility of Regional Council by acting with integrity and respect
- Improve cooperation between Councillors to accomplish tasks in a timely fashion; implement a clear code of conduct and ethics guidelines; ensure there are repercussions for behaviour that deviates
- Increase diverse representation on Regional Committees by including subject experts
- Increase presence of Regional politicians at community events to foster a sense of two-way communication

6 Active Transportation

- Promote utilization of active transportation through the creation of a transit supportive community with bike lanes, pathways, and trail networks integrated with public transportation
- Support connectivity between neighbourhoods, schools and workplaces to ensure residents can safely travel to daily destinations using active transportation
- Design future developments with a community planning lens; ensure new developments have sidewalks and community space

7 Preserving Niagara's Natural Assets

- Concern for loss of greenspace and protecting the rural character of the Region
- Educate and provide incentives for green initiatives and green technology
- Protect and preserve key natural assets including: waterways, farmland, beaches, wetlands, parks and trails, green spaces, wildlife, tender fruit
- Preserve agricultural land and foster sustainable farms; advocate for the agriculture sector and encourage farmers to come to Niagara



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8 Infrastructure In Support of Growth

- Improve connective corridors to mitigate increasing levels of traffic on major arteries during peak hours
- Ensure roads and bridges are adequately maintained for safe and timely travel to meet increased usage due to growth
- Ensure infrastructure is matched to growth and development to support upcoming residential, commercial and industrial development (i.e. road expansions, sewage systems, bridges, traffic lights)
- Incorporate new technologies and quality infrastructure (road, bridge, facilities) to ensure infrastructure lasts longer

21

9 Affordable Housing

- Respondents recognize many issues stem from a lack of affordable housing and want innovative strategies to increase access to safe, affordable places to live for all; a disconnect between available housing prices / rent and earnings is identified
- Affordable housing solutions need to be inclusive of all residents of Niagara (youth and young families, seniors, single / low income earners, those with disabilities, and renters)
- Alternative solutions in connection with affordable housing to combat homelessness, which is perceived as a problem in Niagara

10 Quality of Life and Public Safety

- Quality of life is defined by respondents as being connected to their community, having access to housing, and feeling safe
- Respondents feel strongly about creating a sense of belonging for all residents and highlighted the need for inclusivity and empowering diverse populations
- Increase community belonging for residents and tourists through community and cultural events, festivals, supporting the arts, and preserving the cultural history of Niagara
- Police visibility and upstream police interventions to foster a feeling of safety
- Modifications such as lighting, increasing walkability and transit options will make people feel safer and more connected to their community

22

11 Equitable Access to Regional Services

- Improve centralization and access to services across the entire region, services distributed with consideration of means of getting to services
- Continue to focus on preventative programs and services that support equity
- Consider integration of alternatives to traditional health care delivery models including outreach services; advocate for increased funding for our health care system and develop a comprehensive physician recruitment strategy; promote and invest in Public Health and Emergency Services



39

12 Water & Waste Management

- Protect natural environment through responsible waste diversion and water treatment; educating public on these matters
- Use technology to be the leader in recycling and water conservation
- Increase uptake of recycling by allowing for more items to be recycled and identify ways to reduce or ease sorting requirements by households

13 Tourism as an Economic Driver

- Respondents are proud of Niagara's strong tourist sector; expand this industry across all municipalities utilizing a collective vision and defined roles
- Promotion and preservation of natural, agricultural, and historical sites which bolster Niagara's quality of life and attractiveness
- Leverage strengths by continued investment in alternative forms of tourism, such as eco-tourism and sport tourism
- Tourism and transportation are intrinsically linked; better transportation infrastructure supports tourism

14 Communication and Engagement with the Community

- Increase opportunities for residents to have their voices heard; respondents want to see their input being incorporated and the impact of their voice
- Ensure Regional government is transparent; open communication and engagement with residents and stakeholders on decisions that affect their community with consideration for all the different needs of the community (marginalized or specific population segments, wildlife, natural assets, rural and urban needs)
- Easier access to Regional and municipal information and services including physical access and improved navigation; align customer service and ease of navigation between Region and LAMs
- Increase opportunities to create a sense of community

15 Youth and Young Family Retention

- Support a comprehensive youth retention strategy to retain a qualified labour force, meeting future needs of industries and economic growth.
- Retain youth and young families by fostering strong partnerships between post-secondary institutions and business sector to match local graduates with employment opportunities; ensure education programs fill gaps in the workforce; foster creation of new, quality jobs in emerging sectors such as technology; create an entrepreneur and technology friendly region
- Attract youth and young families through marketing of employment opportunities; provide supports and promote reasons for young people to start or bring families here
- Ensure that input from youth and young families is used to focus retention efforts and validate the needs of the generation

16 Responsible Spending

- Respondents would like to be better informed on where their tax dollars are going through increased transparency in government spending, budgets and decision-making
- More stringent guidelines as to what are appropriate expenses for elected officials, and what are appropriate expense amounts
- Ensure the reduction of inefficiencies and duplication is a priority; re-evaluate the current governance model to reduce duplication between Regional and LAM services

17 Mental Health Services

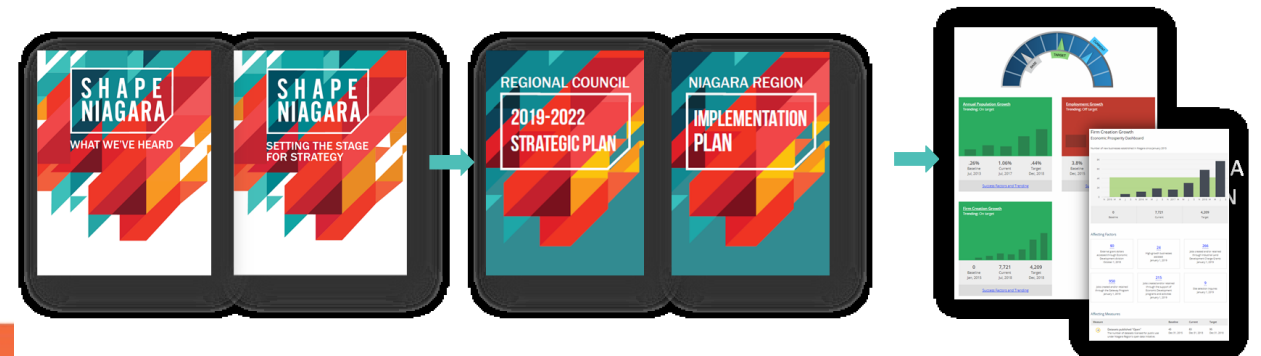
- Ensure comprehensive mental health services are available in a timely fashion; targeted services for seniors, children and young adults
- Improve accessibility to mental health services through localizing services in community hubs, allocate mental health staff to outreach programs, programming in schools
- Work with all levels of government to create a comprehensive mental health strategy in provision of services and to reduce stigma
- Foster improved collaboration between organizations that provide mental health services to best service all residents; Region can act as a leader in forming a network and marketing available supports



Next Presentation Deck

- “Setting the Stage for Strategy”
 - Overview of content from Environmental Scan
- Strategic Planning Process & Timeline
 - Council Strategy Workshop
 - Anticipated Timelines

Questions?





SETTING THE STAGE FOR STRATEGY

Overview

- “Setting the Stage for Strategy”
 - Environmental scan of current state and influencing factors
- Strategic Planning Process & Timeline



Setting the Stage for Strategy Report

Methodology

- Environmental Scan: Global, National, Provincial & Local document, data and information review
 - Key internal priorities, plans and documents
 - Documents released by external agencies or organizations (Chambers of Commerce, Niagara Workforce Planning Board, national / global agencies)
 - LAM strategic plans, reviews of other Ontario plans
 - Discussions with local Members of Provincial Parliament (MPP)
 - Federal government documents and policy briefs

What's in the *Setting the Stage for Strategy* Report

- Project Overview
 - Objective of the initiative
- What's Happening Outside Niagara
 - Global, National, Provincial trends
- What's Happening in Niagara
 - LAM priorities
 - Population, physical environment, employment & jobs, and community wellbeing information
- Setting the Stage for Strategy
 - Community Vision, SWOT
 - Tying the organization's initiatives with Community priorities

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Global Trends

- A summary of global themes include opportunities in technology advances, innovations in policy and services, and how communities are evolving across the globe
 - Digital Economy
 - Increased expectations around Quality of Life and supports for marginalized populations
 - A focus on preserving the Natural Environment
 - What's Happening in the United States



U.S. News and World Report, Best Countries Report (2019)

National Trends

- A summary of top Federal Government priorities for Canada
 - Economic Growth
 - Supporting Canadians
 - post-secondary education, family supports
 - Fighting Climate Change

Ways to Build a Canada that Wins (2018)

Make Canada a magnet for business investment

Ensure a globally competitive North America, make Canada a global innovator

Make Canada an agri-food powerhouse

Develop agile workforce strategies

Make all of Canada an Export Gateway

Ensure the unrestricted movement of goods and people across Canada

Help Small-Medium-Enterprises trade and grow

Canadian Chamber of Commerce, "Ten Ways to Build a Canada that Wins" (2018)

Provincial Trends

- A summary of the preliminary outline of PC provincial government's platform
 - Repeal of Green Energy Act
 - Creation of 6,000 new long-term care beds
 - Development of Housing Supply Action Plan
 - Affected departments will discuss these impacts with Council directly as new announcements are made
- Niagara's MPP's
 - Focus on job creation and economic development
 - Welcomed increased collaboration in advocating for Niagara's needs

Ontario at a Glance

According to the Ontario Chamber of Commerce, expected movement in the Ontario economy include increases in business investment, industrial and commercial activity, machinery and equipment spending. The labour force skill gap still exists, and companies are unable to find the right people to do the jobs. This issue is not expected to change in the near future, and it is a priority for many organizations and levels of government.





What's Happening in Niagara: Local Area Municipalities



We need to ensure we are using a unified approach between the Region and municipalities, building on our prior successes. A multi-level approach will lead to a stronger voice for Niagara.



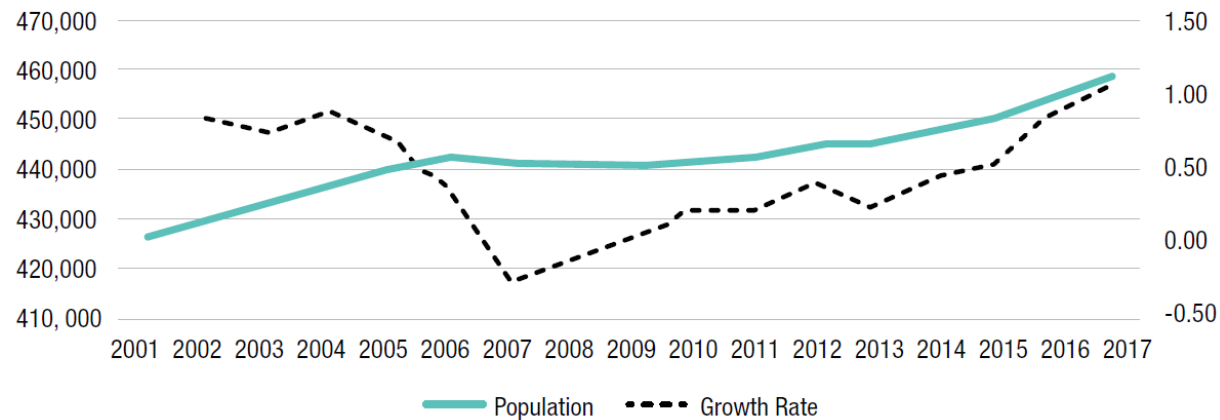
- Key priorities of senior leaders at Local Area Municipalities:
 - Alignment between upper and lower tier priorities
 - Cooperation and support across levels of government in Niagara
 - One voice and a collective focus

Strategic Priority	Number of LAMs that have Priorities Aligned with Region
 Economy	10/10
 Resident Life	10/10
 Service Delivery	10/10
 Transit Active Transportation	7/10

Local Area Municipal Strategic Plans (2018)

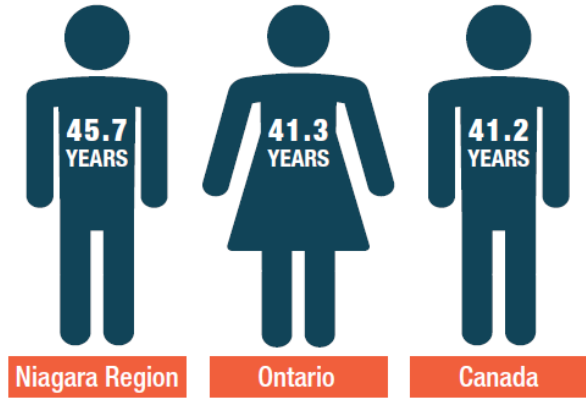
What's Happening in Niagara: Niagara-Specific Data

Population and Growth Rate



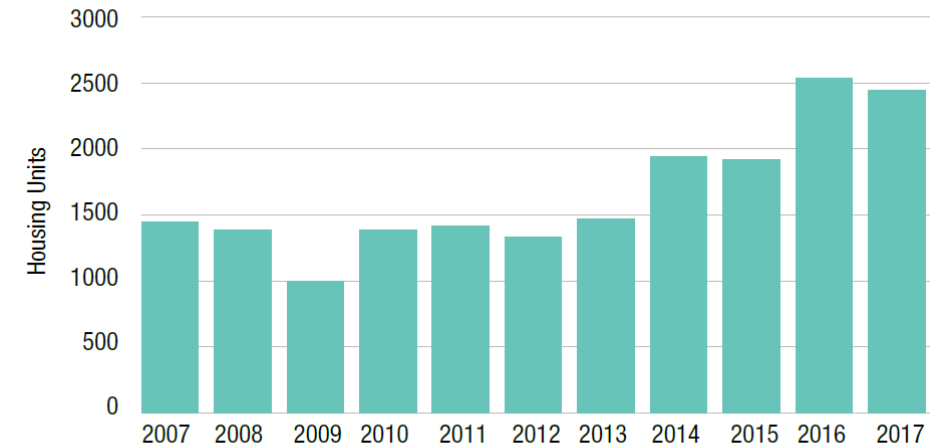
Statistics Canada, Annual Population Estimates (2001-2017)

Population's Median Age



Statistics Canada, Median Age (2016)

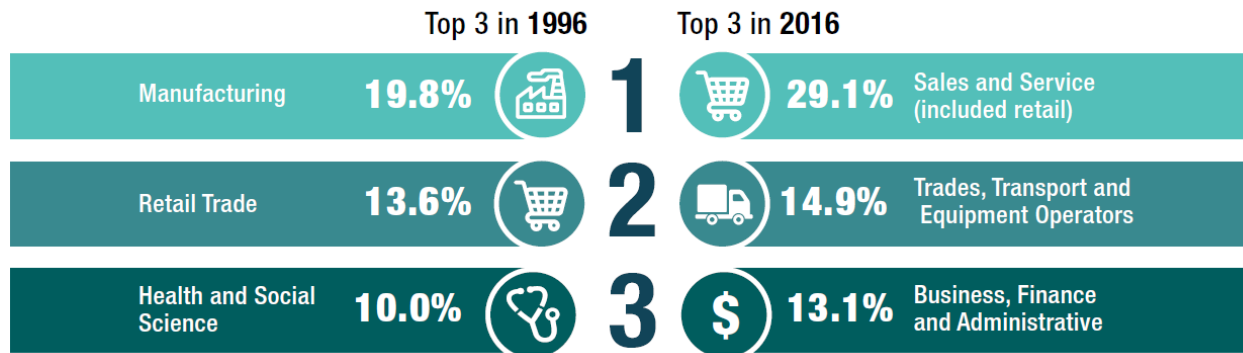
Housing Starts



Canada Mortgage and Housing Corporation, Housing Now Tables (2018)

What's Happening in Niagara: Niagara-Specific Data

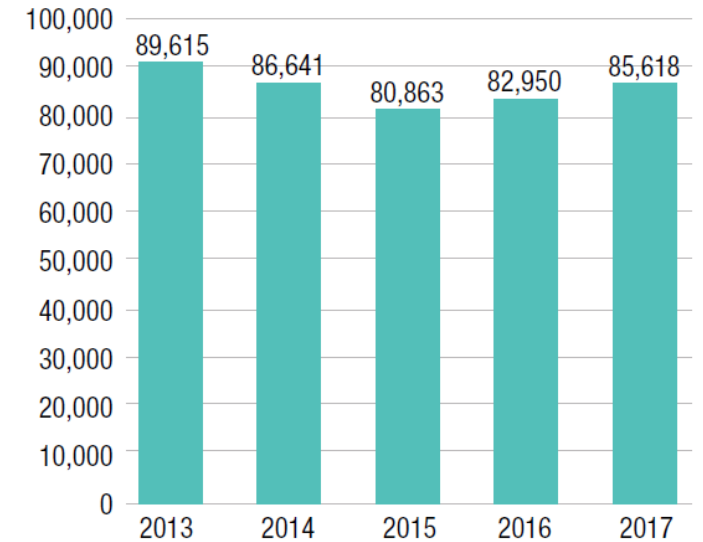
Job Sector Changes in Niagara



Statistics Canada, Niagara Census Profile (1996, 2016)

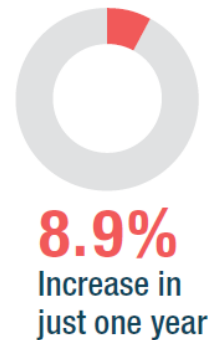
Note: Industry classification code description for job sectors have changed slightly from 1996 to 2016

Average Household Income in Niagara



Municipal Tax Study, BMA Management Consulting Inc. (2013-2017)

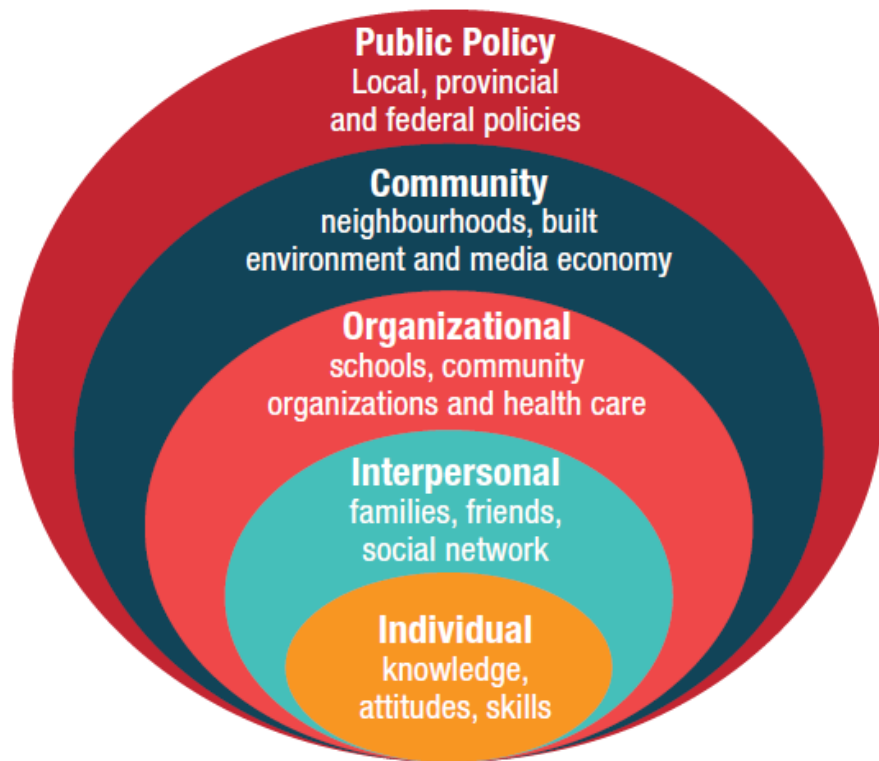
Cost of Living



Niagara Poverty Reduction Network (2017)

What's Happening Niagara-Specific Data

Socio Ecological Model



Category	Regional Service Description	Impact on Wellbeing
Infrastructure	Transportation (active, public transit, automobile, commercial), roads and bridges, waste management, water, wastewater, buildings	<ul style="list-style-type: none"> Safe and affordable housing Water and sanitation Access to services through safe and maintained transportation infrastructure
Access to Services	Senior services, child and family services, housing and homelessness, transportation and walkability (enabling mobility and access to services) Public health services, bike lanes and pathways, ambulances and emergency services	<ul style="list-style-type: none"> Equitable access to health programs and services Healthy child development Physical and social environment Social inclusion
Physical Environment	Environmental protection, sustainable development, land use planning policy, urban design, active transportation infrastructure	<ul style="list-style-type: none"> Access to greenspace Food security through access to nutritious food, agriculture and food production
Economy	Supports for jobs and skilled labour, investment attraction	<ul style="list-style-type: none"> Employment and job security Equitable income distribution Addressing precarious employment and working conditions
Governance and Advocacy	Proactive leadership, fiscal responsibility, open government, advocacy for Niagara	<ul style="list-style-type: none"> Ensuring active participation and engagement of communities in decision making Equitable access to services
Community Wellbeing	Safety, police presence, community planning, walkability, engagement, newcomer supports	<ul style="list-style-type: none"> Social inclusion Built environment conducive to physical activity, recreation and walkability for all ages Sense of belonging promoting social cohesion

Setting the Stage for Strategy

- Before the development of a Strategic Plan, need to be informed
 - Environmental Scan
 - Shape Niagara reports
 - SWOT analysis
 - Departmental Initiatives

S

Organizational Strengths

- Ability to leverage global brand recognition: Niagara Falls, Niagara Wine Industry, Welland Canal and all surrounding attractions
- Collaboration with local community organizations, post-secondary institutions
- Partnerships with local area municipalities to better serve residents such as development and customer service
- Economic designations and incentives to drive growth
- Ongoing work to build connective transportation network
- Building organizational maturity around data driven decisions, project management and asset management

W

Organizational Weaknesses

- Coordination with local area municipalities and Region to bring a singular voice to higher levels of government and customer service
- Ability to handle future increases in service demand. Including, factors such as growth from Greater Toronto Area and aging population.
- Sustainable funding for Regional services such as infrastructure projects and social services
- Widespread densely populated areas, service delivery reach can be challenging
- Customer service including opportunities to increase hours of operation or access to services

O

External Opportunities

- Geographic location, access to Greater Toronto Area and Buffalo, natural assets and greenspace
- Potential provincial or federal funding opportunities
- Emerging economic sectors, such as sports tourism and cannabis
- Explore broadband opportunities for rural areas
- Opportunities to align services to emerging higher level government priorities. Such as federal requirements for coordinated of services
- Enhance organization's reputation including transparency, trust and accountability

T

External Threats

- Provincial and federal unknowns in policy and funding
- Workforce pressures such as the inability to retain and recruit skilled workforce
- Lack of succession planning in local businesses
- Dependency on seasonal and precarious employment
- Youth and young family retention
- Increasing housing prices
- Impact of aging population on regional services and economy, however these could present as potential opportunities

Aligning Regional Services to the Community Priorities

- Direct linkage made to the 17 Community Priorities identified in the *What We've Heard* report



Planning and Development Services

How Niagara Grows

Aligning to Niagara's Community Priorities:

Niagara's community would like to see sustainable and thoughtful growth that is aligned with diverse community needs and transparency in spending. The community also identified the importance of protecting and maintaining a resilient natural environment, as well as protecting the rural character of the Region, key natural assets and agricultural land.

The Region's Planning and Development Services initiatives align with the following priorities around growth, sustainable development and environmental protection:

4. Environmental Responsibility and Sustainable Development	What We've Heard Report, page 41
5. Accountable and Collaborative Government	What We've Heard Report, page 41
7. Preserving Niagara's Natural Assets	What We've Heard Report, page 42
16. Responsible Spending	What We've Heard Report, page 45

Past Organizational Initiative

Expedited Process for Development

An expedited planning approvals process was developed to increase approval certainty and accelerate the review period for development initiatives. The project created an evidenced-based evaluation procedure to evaluate sites and created the ability to showcase "shovel-ready" sites as part of Niagara's competitive advantage in attracting new investment.

Upcoming Organizational Initiatives

Official Plan

Growth Management including a housing strategy, employment land strategy, urban structure and land needs assessment.

Natural Systems including agriculture, natural heritage system, aggregates and climate change.

Employment Land Strategy

Planning and Economic Development will be working on an Employment Land Strategy, as part of the Official Plan work to identify strategies to protect Niagara's employment lands. As part of this, there are efforts underway with the St. Lawrence Seaway and Hamilton Port Authority to investigate land acquisition as part of a Niagara Port Strategy.



Aligning Regional Services

- Past Initiatives – successes coming from the 2015-2018 Council Strategic Plan



Enterprise Resource Management Services (ERMS)

Corporate Services Supporting the Organization

Aligning to Niagara's Community Priorities:

Community members identified a desire to stay informed about where their tax dollars are spent through transparency in government spending, and decision-making.

Fostering "organizational excellence" is a generic term, which encapsulates the goal of improving the way the Niagara Region as an organization functions. The focus of the community comments received identified a desire to build on collaboration, customer service and opportunities to foster informed decisions as an organization.

The Region's ERMS initiatives align with the following community priorities around accountability and organizational excellence:

8. Infrastructure in Support of Growth.....	What We've Heard Report, page 42
11. Equitable Access to Regional Services	What We've Heard Report, page 43
14. Communication and Engagement with the Community.....	What We've Heard Report, page 44
16. Responsible Spending.....	What We've Heard Report, page 45

Past Organizational Initiative

Enhanced Financial Management Service

The implementation of an integrated enterprise solution to provide system functionality that improves efficiency and effectiveness, reduces risk, enables effective internal controls, ensures better management of the organization, and improves the client experience.

Value for Money Audits

Determining if Regional programs, including the execution of policies and procedures, are delivered in an efficient, effective and economical manner. Over 13 recommendations were compiled to address corporate project management methodology, asset management, cost estimation, document management, performance measurement and other issues.

Southwestern Integrated Fibre Technology (SWIFT)

Looking to secure federal and provincial funding to improve Niagara's information infrastructure and to provide better connections for residents and businesses in rural communities. Through the project, Niagara is now a key partner in a larger buying group to attract broadband providers.

Aligning Regional Services

- Upcoming Initiatives – initiatives or projects that are underway or already approved to move forward



Community Services

Services Supporting Niagara's Residents

Aligning to Niagara's Community Priorities:

Niagara's community identified the need to support residents in a way that makes Niagara a place where everyone can thrive. An importance was placed around supporting populations in need by ensuring necessary services are provided including senior services, affordable housing, services for young families and vulnerable populations.

The Region's Community Services initiatives align with the following community-identified priorities:

3. Supporting populations in need through employment, affordable housing and transit.....	What We've Heard Report, page 41
9. Affordable Housing.....	What We've Heard Report, page 43
10. Quality of Life and Public Safety.....	What We've Heard Report, page 43
11. Equitable Access to Regional Services.....	What We've Heard Report, page 43
15. Youth and Young Family Retention.....	What We've Heard Report, page 45

Past Organizational Initiative

"Bend the Curve" on the Ontario Works Caseload

Goal was to increase the number of Ontario Works and Ontario Disability Support Program clients with employment. The BENN (Building Employment Networks Niagara) system launched in November of 2017. The shift from a manual tracking to system automation has resulted in an increase in the quantity of referrals and efficiency (real-time) of matches to training programs and employment opportunities. The long term goal is to further reduce the Ontario Works caseload.

Upcoming Organizational Initiatives

Long Term Care Home Redevelopment Projects

The redevelopment of two Long Term Care (LTC) homes has been undertaken to meet provincial compliance and fire code requirements. The new homes will be designed to enhance efficiencies and will be situated on campuses with co-located services to support long-term care residents and the local community.

Affordable Housing

To fulfill Niagara Region's provincially legislated responsibility, staff are preparing an updated 10-year Housing and Homelessness Action Plan (HHAP) to be presented to Council for approval in the spring of 2019. The revised HHAP will be integrated with the work on the new Regional Official Plan now in development, further contributing to an overarching regional Affordable Housing Strategy. This strategy will include a Regional Housing Statement, a review of and recommendations for Regional policies and financial incentives with the aim of increasing the availability of affordable housing in Niagara.



Aligning Regional Services

- Potential Initiatives – pending approval, or for consideration in the development of the Implementation Plan



Public Health and Emergency Medical Services

Building a Healthier Niagara

Mental Health Promotion Strategy (MHP)

Mental health, as part of Niagara's Top Ten was identified as one of the top burdens of disease in Niagara. The goal of the MHP strategy is to build mental health literacy and reduce stigma, ensuring that MHP is embedded into all initiatives within Public Health by making "every contact count".

Parenting Strategy

A framework to guide decision-making about how we support and engage with parents and families in Niagara. By using a Social Determinants of Health lens, this strategy is aligned with the Health Equity Strategic Plan and Mental Health Promotion Strategy to support populations in need. The strategy will equip parents in Niagara with the knowledge, skills, and resources necessary for their children and family to thrive, and ultimately make Niagara the best place to raise a family.

Potential Organizational Initiatives

Emergency Medical Services (EMS) Transformation

EMS call volume has been steadily increasing over the last few years and is projected to continue according to this trend. Paired with hospital offload delay issues, this has prompted a review of how ambulances and paramedics are dispatched. EMS is identifying new ways of doing business to better handle this volume by providing tailored care to make services available, accessible and affordable. EMS transformation is in progress as a pilot and has dedicated resources around project coordination. A complimentary restructuring of the physical footprint of ambulance bases, the hub model has been deferred to 2020.

Potential Opportunities

- A corporate and public health movement towards outcome focus with supporting data and dashboards, utilizing business intelligence software
- Transforming the way Niagara Emergency Services (EMS) deliver service, through the EMS transformation and hub projects
- Customer service changes to bring multi-modal opportunities for clients to access services
- Connective transportation to connect people to needed services

Potential Obstacles

Potential provincial funding and policy changes with the new Provincial government
Emerging issues in health, for example, opioid crisis, and legalization of cannabis
Climate change impacts on environment and health status in Niagara
Provincial government plans to restructure the health sector, and review Regional governments



Aligning Regional Services

- Potential opportunities – a scan of internal & external opportunities



Public Works

Infrastructure and Service Delivery

Transportation Services, Master Plan Implementation

Implement strategic investments in all modes of transportation to support growth and create a balance of community expectations for active transportation and complete streets such as capacity improvement, East-West Transportation Corridor, escarpment crossing.

W/WW Financial Sustainability and Asset Management

Meeting legislative requirements (Safe Drinking Water Act) to implement and demonstrate a rigorous asset management program in the sustainability of W/WW systems. Tying in with asset management efforts, doing the right work, on the right asset, at the right time, for the right cost while minimizing risk.

Enhancement of Management Cycle of Pavements

Improving how the cycle of pavement maintenance is managed, including crack sealing, patching and resurfacing.

Leveraging New Technologies in W/WW

In an effort to improve service delivery, W/WW will leverage new technologies to pursue Automated Systems, Advanced Reporting Systems, event-based preventative maintenance, GIS improvements, workforce mobilization.

GO Train-Enabling of Capital Investments

Ambitious and aggressive project plans for key transportation projects adjacent and supportive of GO station locations. Upcoming or potential projects include Casablanca Blvd, St. Paul W Canadian National Railway Bridge, Louth Street / Ridley Road, Thorold Stone Rd Extension, and Bridge Street.

New Waste Collections Contract

To be developed with input through a service level review. Includes a social marketing and outreach campaign to support implementation of new service.

Potential Opportunities

- East-West Transportation Corridor to relieve traffic congestion
- Innovations in service and funding opportunities
- Material recycling opportunities for road construction
- Potential for smaller funding opportunities through Federation of Canadian Municipalities (FCM) for capital projects

Potential Obstacles

- Cap and Trade and Provincial Gas Tax, leading to higher energy costs, funding impacts
- Increasing construction costs (trade tariffs)
- Climate change impacts (more severe or wet weather)
- Provincial legislation and regulation, for example, divertible material service standards, Ministry of Environment, Conservation and Parks surplus soil policies, MPAC restrictions on data use
- Provincial and federal policy changes
- Funding uncertainty from all government levels (provincial, federal, regional, local)



Aligning Regional Services

- Potential obstacles – a scan of what is stopping us



Office of the CAO

Economic Development

Skilled Labour Shortage

The Economic Development department is collaborating with organizations such as Niagara Workforce Planning Board, Niagara Industrial Association, Niagara's post-secondary institutions and School Boards to tackle the mismatch between labour skills and jobs across the Region.

East-West Transportation Corridor

Economic Development will support Public Works to develop an application to secure infrastructure funding from Transport Canada's National Trade Corridors Fund. The funding would construct a portion of the East-West Transportation Corridor, which would run roughly from Fort Erie to Hamilton Airport in support of goods movement. It would tackle the congestion issue on the Queen Elizabeth Way (QEW) which is a significant risk for the tourism, agriculture and manufacturing sectors in Niagara.

St. Lawrence Seaway Management Review

Elected officials have presented a joint submission with five Niagara area municipalities along the Seaway corridor to the federal government regarding a consultative review of the St. Lawrence Seaway conducted by Transport Canada in 2018. The recommendation to Transport Canada is a new management model for marine-strategic lands and an analysis of non-strategic land. Niagara has recommended that Transport Canada, with support from the Ontario Ministry of Transportation, consider a partnership with the Hamilton Port Authority with respect to the management of marine-adjacent strategic parcels of the St. Lawrence Seaway through Niagara.

Strategic Marketing

Conducting targeted marketing activities to position Niagara as a competitive location for business investment.

Trade and Investment

Promoting the Niagara Region through investment attraction and lead generation activities (investment missions) to strategically targeted sectors and within specific geographies.

Potential Opportunities

- Increased market interest and growth coming from the Greater Toronto Area
- Economic Trade Corridor designation award which would support infrastructure-funding applications and create unique marketing opportunities
- Niagara Foreign Trade Zone role in export diversification for Niagara companies
- Creation of a provincially significant employment zone with the Niagara Gateway Economic Zone and Centre

Potential Obstacles

- Meeting current and future labour needs for skilled trades and professional occupations
- Shortage of employment land that is shovel-ready and development pressures on land zoned for employment
- Infrastructure pressures, for example, congestion on the QEW
- Scheduling of public transit needs to align with employment needs
- Lack of succession planning in Niagara businesses

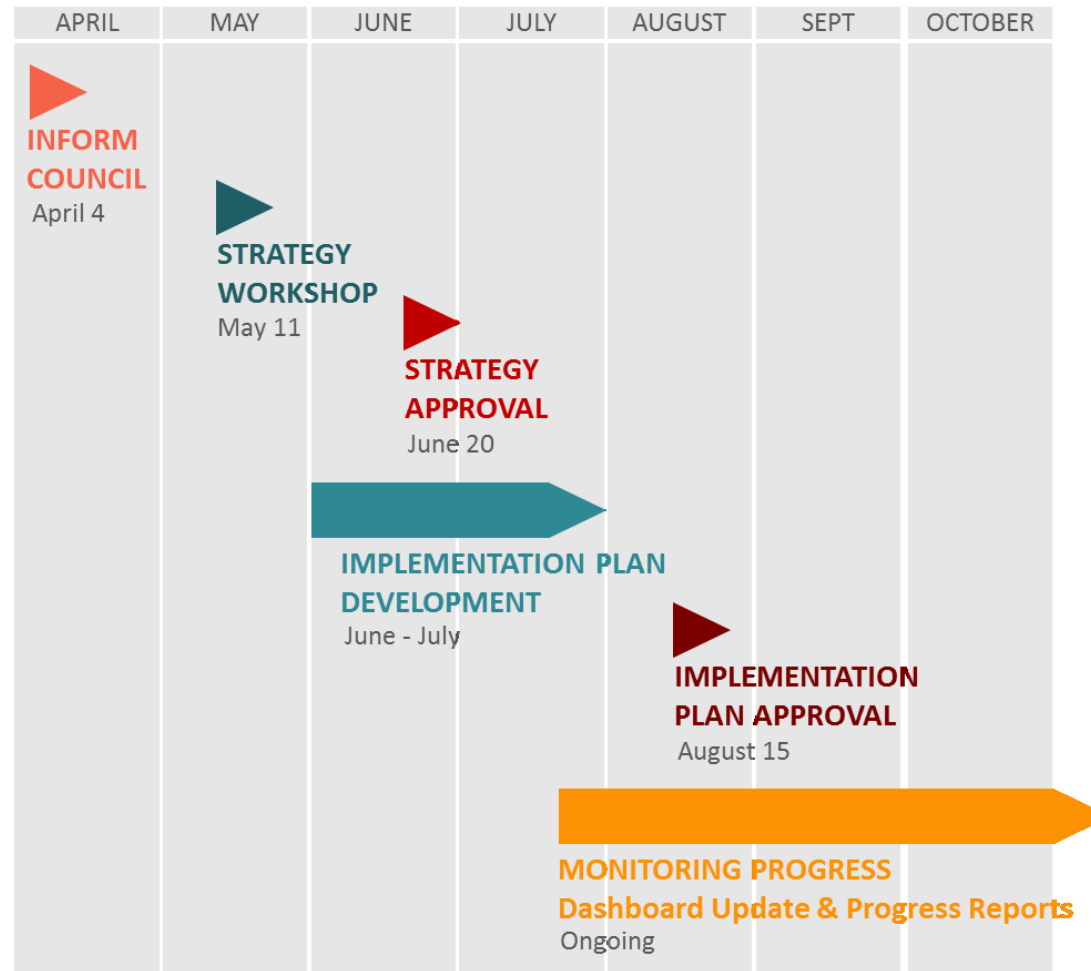


Strategic Planning Process & Timelines

Anticipated Timeline



2019



Council Strategic Planning Workshop

- Full day workshop to develop Council's 2019-2022 Strategic Plan
 - May 11 at Armenian Community Centre in St. Catharines
 - Vision Setting
 - Council's Strategic Priorities
 - The goals to define these priorities; and
 - The objectives to achieve these priorities
 - Preliminary work and input on an implementation plan to action the strategy

Questions?



Regional Municipality of Niagara

Service Sustainability Review

Presentation to the Committee of the Whole

April 4th, 2019



Service Sustainability Review

Agenda

- Introduction
- Overview of the Review
- Initial Perspectives
- Council's Involvement

Service Sustainability Review

Scope of Review

- Consistent with the Region's objective for fiscal responsibility, transparency and ongoing sustainability
- The review will provide a better understanding of Region services – rationale, service levels, delivery model, resource allocations, collaboration with local area municipalities
- The review will also provide a roadmap of opportunities for cost reductions and capacity gains, contributing towards longer term sustainability



Service Sustainability Review

Identifying Opportunities

Efficiency and effectiveness enhancements



Service level reductions



Cost recoveries



Alternate service delivery



Service Sustainability Review

Initial Perspectives

- Discretionary services are more the exception than the rule
 - Fiscal restraint
 - Nature of upper tier services

Niagara By The Numbers (2012 to 2017)

+2.7%

Average annual
tax levy*

*Lowest of Ontario's
six regional
governments*

+2.0%

Average annual
operating costs

*Lowest of Ontario's
six regional
governments*

+2.9%

Average annual
personnel costs

*Lowest of Ontario's
six regional
governments*

* Before the impact of assessment growth



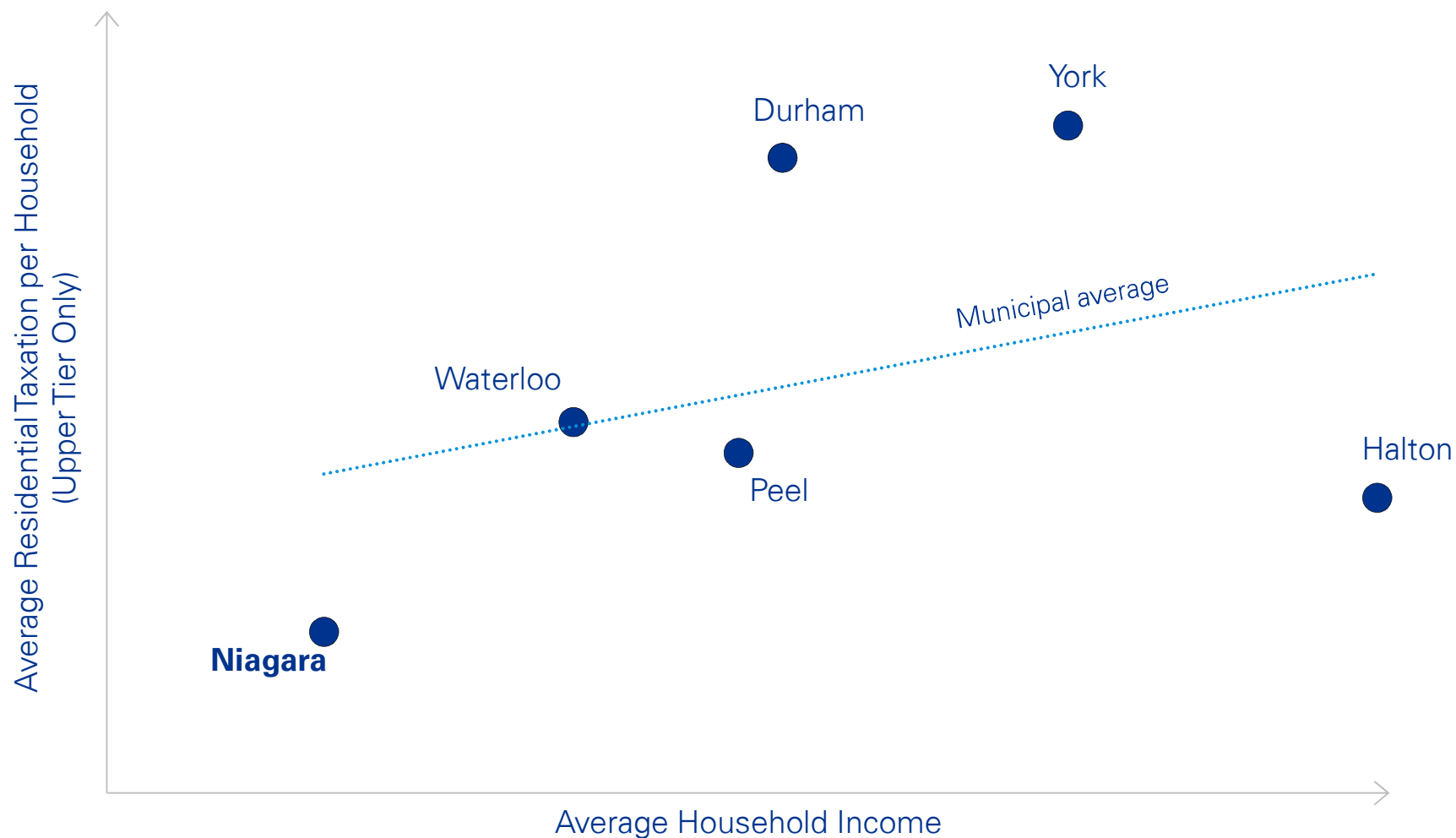
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Service Sustainability Review

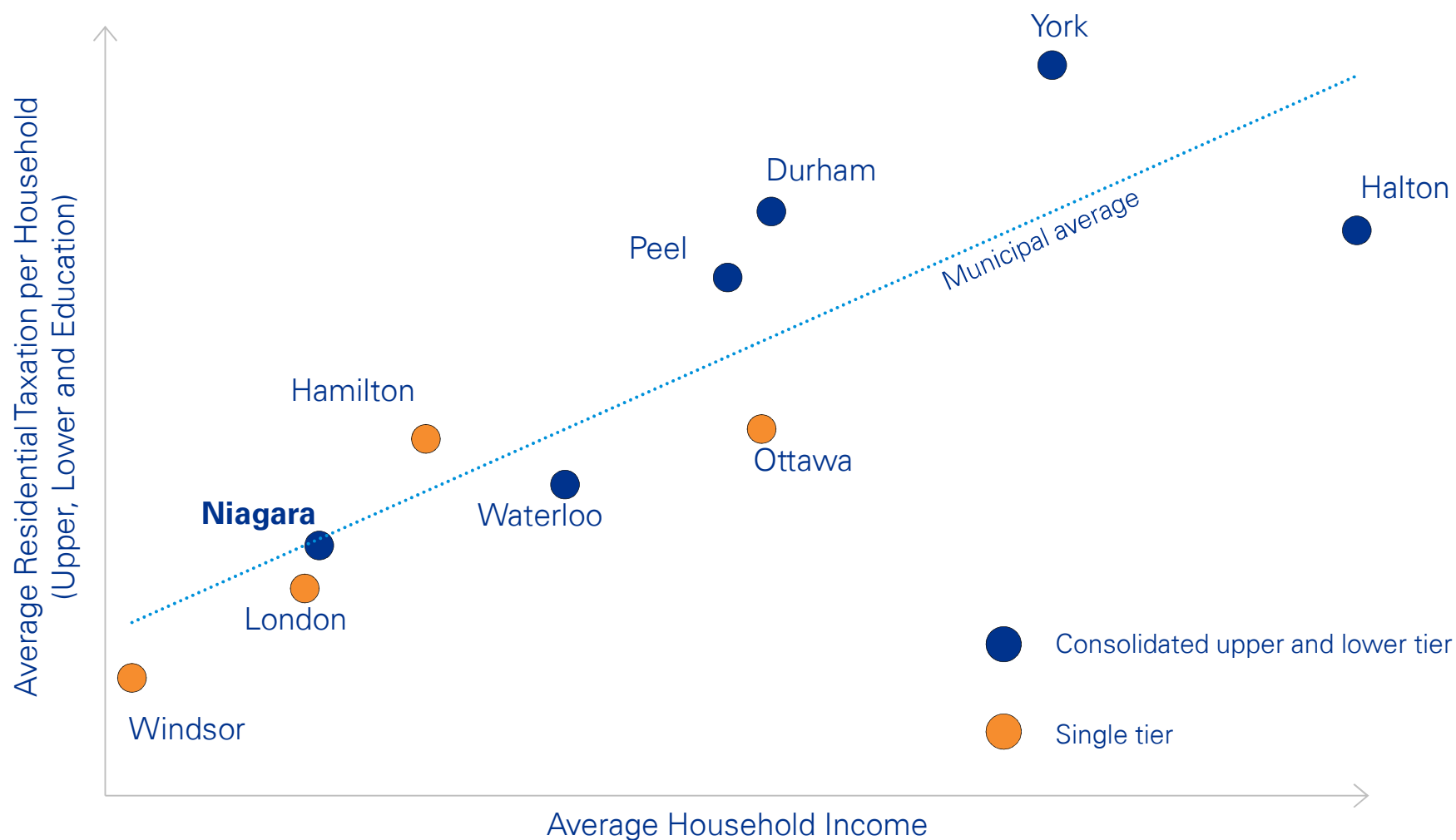
Initial Perspectives

- Discretionary services are more the exception than the rule
 - Fiscal restraint
 - Nature of upper tier services
- Taxation levels, while a valid concern, are consistent with comparator municipalities

Niagara By The Numbers (2017)

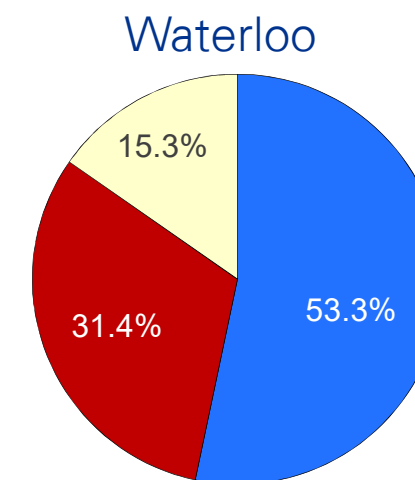
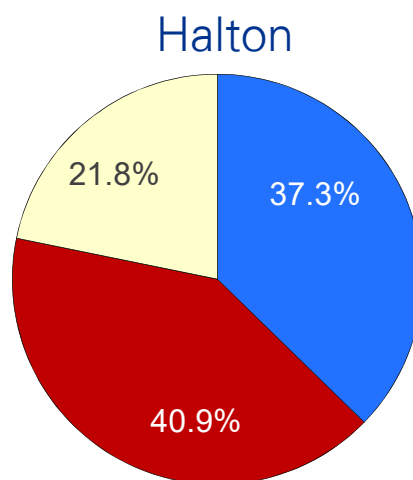
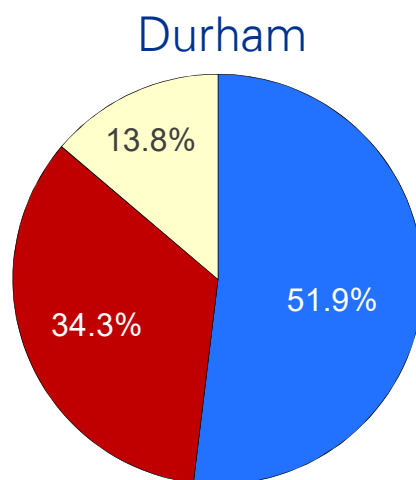
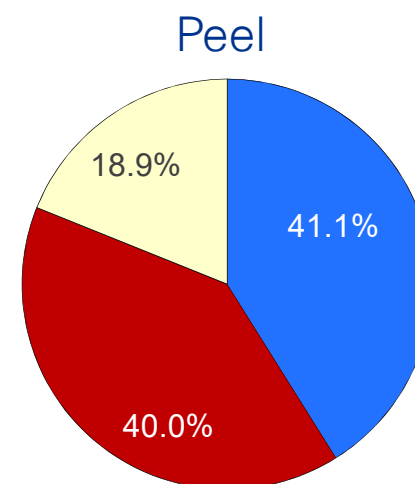
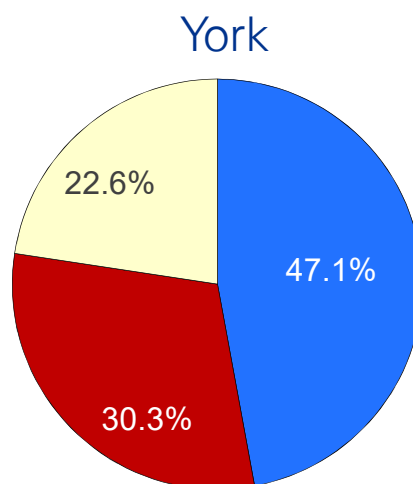
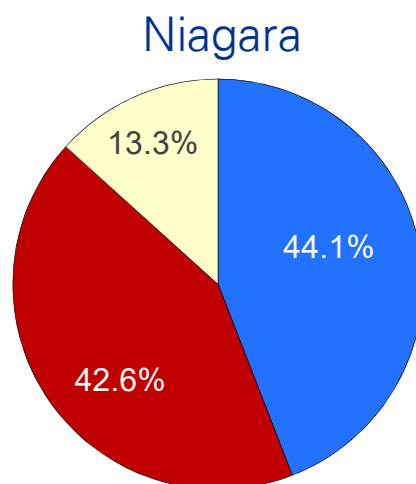
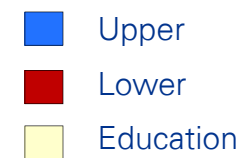


Niagara By The Numbers (2017)



Service Sustainability Review

Levy Composition



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Service Sustainability Review

Initial Perspectives

- Discretionary services are more the exception than the rule
 - Fiscal restraint
 - Nature of upper tier services
- Taxation levels, while a valid concern, are consistent with comparator municipalities
- Indicators of financial performance support the concept of the service sustainability review

Niagara By The Numbers (2017)

\$1,402

Reserves per
household

*Lowest of Ontario's
six regional
governments
(Average - \$4,232)*

\$667

Capital Investment
per Household

*Lowest of Ontario's
six regional
governments
(Average - \$1,855)*

57.5%

Remaining Useful
Life of Assets

*Lowest of Ontario's
six regional
governments
(Average - 67.9%)*

Service Sustainability Review

Initial Perspectives

- Discretionary services are more the exception than the rule
 - Fiscal restraint
 - Nature of upper tier services
- Taxation levels, while a valid concern, are consistent with comparator municipalities
- Indicators of financial performance support the concept of the service sustainability review
- Silver bullets will be few and far between

Service Sustainability Review

Council's Involvement

- We will provide status updates to Council throughout the review
 - Presentations
 - Written communications
- Three working sessions with Council and the Executive Leadership Team have been proposed:
 - Ranking criteria (September)
 - Draft prioritization of opportunities (October)
 - Business case and implementation framework (January)
- In addition to the above, we are available to meet with Council when and as required



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Subject: Shape Niagara - Council Strategic Planning

Report to: Regional Council

Report date: Thursday, April 4, 2019

Recommendations

1. That the this report outlining the process for developing the 2019-2022 Council Strategic Plan, and which includes the Shape Niagara environmental scan reports “*What We’ve Heard*” and “*Setting the Stage for Strategy*”, as well as the departmental SWOT Analysis, **BE RECEIVED**.

Key Facts

- Typically, before the start of each new term of Regional Council, staff prepares a background report which sets the stage for Council to create their new term strategic plan. For this term of Council, staff have undertaken community engagement and environmental scan efforts through an initiative entitled Shape Niagara. The information has been summarized within a pair of reports: *Shape Niagara - What We’ve Heard* and *Shape Niagara - Setting the Stage for Strategy*, found in Appendix 1 and 2 respectively.
- During Council Orientation in November of 2018, a Council Information request was put forward to put together a departmental SWOT Analysis, this request has been fulfilled and is contained in Appendix 3.
- A strategic planning workshop will be hosted on May 11, 2019. This workshop will be the opportunity for all Council members to come together to identify their collective priorities, and to set the goals and objectives that will become the 2019-2022 Council Strategic Plan.
- The results of the workshop will be brought back to Council for final approval and following that, senior staff will put together a project-based implementation plan for Council’s consideration, to action the priorities of Council.
- The Shape Niagara reports are available for public viewing and download on the Region’s webpage at www.niagararegion.ca/priorities. This webpage is where the final strategy will also be posted.

Financial Considerations

It is the intent that a project-based implementation plan be developed to action the 2019-2022 Council Strategic Plan, and timing will be aligned to coincide with the 2020 budget planning process. This will allow Council to make timely decisions to align resource requirements to the projects identified to action the strategic plan.

Analysis

A strategic plan is an important document, particularly for municipal government, as it is the basis for aligning the work of the organization with the priorities of Council. The strategic plan guides the corporate workplan which allows the organization to dedicate adequate resources to address Council's priorities, and to be transparent and accountable to the results. It is about solving the right problems, to deliver value to the residents of Niagara.

The Strategic Planning Process

A comprehensive strategic planning process follows a four step cycle:

1. Environmental Scan - A typical strategic planning process begins with an environmental scan of internal and external factors, and should include stakeholder consultation. This is followed by a review of an organization's strengths, weaknesses, opportunities and threats (SWOT Analysis) which provides a clear picture of the current state.
2. Defining the Strategy - Following a review of the current state is the opportunity to identify the vision for the future, and define the goals and objectives that will allow the organization to reach that vision.
3. Implementation Plan – An implementation plan is developed which will identify the actions required to realize the goals and objectives. The Region has had success in the past with a project based plan that allows the organization to focus on tangible, deliberate outcomes, designed to reach the specific objectives and goals of Council.
4. Monitor & Measure Success - The last stage of the strategic planning process is to monitor and evaluate progress towards those goals. The Region enables public transparency in two ways: First, through project progress reporting throughout the term, and second, through the Region's public facing performance measurement dashboard which will be re-aligned to the new Council strategic plan.

1. Environmental Scan – Background Documents

As the end of each term of Council nears, staff typically prepares a background report which serves to inform the new Council on the current state of Niagara, as well as Niagara's position with the provincial, national and global landscape. For the 2019-2022 term of Council, a pair of reports were created to serve this purpose and were branded as Shape Niagara.

The first report provides the results of an extensive community engagement initiative that captures the priorities as identified by the residents, businesses, organizations and local area municipalities of Niagara, “*Shape Niagara – What We’ve Heard*”, and can be found in Appendix 1 of this report.

Details around the community engagement initiative, including methodology, and results are captured in full within the *What We’ve Heard* report. The key takeaways from this report is that staff collected qualitative, open ended feedback from which a thematic analysis was conducted to identify common trends that recurred throughout the data. The narrative of these themes, which provides the story and context behind the feedback was also captured. From this analysis, 17 Community Priorities were identified, numbered in rank order with the first priority being identified most frequently.

The second report, “*Shape Niagara – Setting the Stage for Strategy*”, provides Council with current state information collected through an environmental scan, and can be found in Appendix 2 of this report.

The focus of this report is to provide data and information to Council to support informed decision making during this critical strategic planning process. Data and information from a global, federal, and provincial lens were captured; as well as an overview of the current state of Niagara as both a place to live, and as an organization. This Niagara-specific snapshot captures a range of information including demographic, social, and economic data. The report also includes a view of the alignment of priorities across Niagara’s local area municipal strategic plans (at the time of writing the report). A full matrix which outlines the alignment of strategic themes can be found in Appendix 4 of this report. The last section of the *Setting the Stage for Strategy* report provides a review of departmental initiatives and opportunities which have been linked to the 17 Community Priorities from the *What We’ve Heard* report. Drawing these linkages will give Council a line of sight into how the community priorities align with the services provided at the Regional level of government.

To complete the environmental scan, a SWOT Analysis was conducted at the organizational and departmental levels, and can be found in Appendix 3 of this report.

2. Defining the Strategy – Council Workshop

Following the presentation of the environmental scan documents, members of Regional Council have been invited to attend a strategic planning workshop. This workshop is set up as a full day facilitated working session where Regional Council will work through the development of their strategic vision, goals and objectives for the 2019-2022 term of Council. Senior staff will be present to lend support, provide context, and participate as required in aligning the goals and objectives to Regional services.

Following this workshop, staff will consolidate the information collected from Council and format it to create the 2019-2022 Strategic Plan for Council's final approval. It is anticipated that the final strategy will be brought back to Council as quickly as possible following the workshop, and the aim is for the June 20, 2019 Council meeting.

3. Implementation Plan – Project Based

A strategic plan has no true value without an action plan to implement the goals and objectives that it identifies. A project-based plan allows Council to realize tangible successes, assign the correct resources required, and demonstrate measureable results and value for the residents of Niagara. The results of the 2015-2018 Council Strategic Plan are an example of how successful a project-based plan can be. The *2015-2018 Council Strategy: Term in Review* report can be found on the Regional website at www.niagararegion.ca/priorities.

Once the Strategic Plan is finalized, staff will use Council's input to identify potential projects and develop an implementation plan for Council's consideration. It is the intent that the timing of developing an implementation plan will align with the 2020 budget planning process. Aligning to the Region's established budget planning process will ensure the appropriate dollars and resources are identified up front to set the implementation plan up for success.

4. Monitor & Measure Success – Driving Accountability & Transparency

A public-facing webpage and dashboard are online tools that the Niagara Region uses to share with residents or other interested parties, the performance of the Region's strategy using well-organized, relevant data. Residents may not be familiar with the high level language that a strategic plan typically contains, but may resonate with the tangible, measureable outcomes of these plans.

In order to foster the trust of residents, the Region must provide transparent information around its performance. Having progress reports and performance measures available for public viewing holds the organization accountable. The current webpage dedicated to reporting on Council's strategy, www.niagararegion.ca/priorities, and public facing dashboard, www.niagararegion.ca/priorities/dashboard, will be re-aligned with Council's new strategic goals to provide progress updates, and performance measures that will hold the organization accountable and show progress on the commitments made.

Once Council's strategic planning process is complete, staff will commit to bringing regular progress reports back to Council on the implementation of the goals and objectives, all of which will be made available publicly on the dedicated webpage.

Alternatives Reviewed

The feedback received from the previous Council on the background document that was provided to them in 2015, was that the information did not include the voice of the community. Shape Niagara has addressed that gap by conducting a full community engagement initiative, capturing the voice of Niagara's residents, businesses, organizations and local area municipalities for this Council's consideration in the development of their 2019-2022 Council Strategic Plan.

Relationship to Council Strategic Priorities

This report will provide Council with background information and community input that can be considered in the development of the Region's next 2019-2022 Council Strategic Plan.

Other Pertinent Reports

- CAO 19-2018 Shape Niagara – What We Heard
- CAO 17-2018 Council Strategic Priorities 2015-2018 Term in Review
- CWCD 128-2018 Shape Niagara Public Open Houses
- CAO 06-2018 Shape Niagara

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Appendices

Appendix 1	Shape Niagara – What We’ve Heard
Appendix 2	Shape Niagara – Setting the Stage for Strategy
Appendix 3	SWOT Analysis
Appendix 4	Local Area Municipal Strategy Theme Matrix



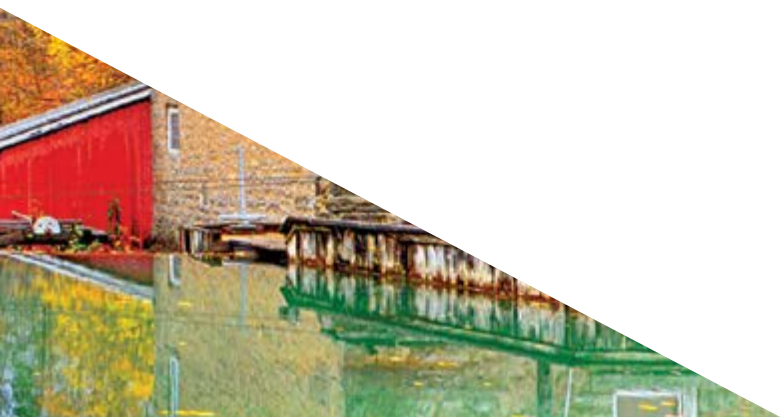
SHAPE NIAGARA

WHAT WE'VE HEARD



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WHAT IS SHAPE NIAGARA?



Shape Niagara is a community engagement initiative focused on collecting feedback from Niagara's residents and community stakeholders on what the next Niagara Regional Council should focus on in the development of their 2019-2022 strategic plan.

Objective of the Initiative

The scope of this community engagement effort was intended to be wide reaching and inclusive. It utilized a variety of methods of engagement (online and in-person) to collect information from a diverse range of community stakeholders (residents, community partners, organizations and businesses).

The Region collects feedback from the community on specific projects and initiatives on a regular basis. Incorporating what was heard from the community throughout the term from relevant past surveys reinforces what was heard through this initiative and assists with the prioritization of what is most important to Niagara's residents.

Council's Strategic Plan

Niagara Regional Council's strategic plan underpins all of the activities undertaken by the organization during the term of Council. The plan guides which projects and initiatives staff will work on, what is considered a priority and how best to resource these activities.

As the end of each Council term approaches, staff typically prepare a background report which serves to inform the incoming Council on the current state of Niagara, providing the relevant information that can be used to create a new strategic plan. In preparation for this background report, relevant information on the current state of Niagara is gathered and is coupled with community feedback. This **What We've Heard** report comprises the community feedback component. A secondary report with the remainder of the background information will go to the new Council at the beginning of 2019, and Council will go through a full strategic planning process at that time.

Six Areas of Focus

Six areas of focus were identified to provide a means for data to be sorted and to gather context around feedback submitted.

-  **Infrastructure and Services**
Transportation, roads and bridges, waste, water, senior services, child and family services, housing and homelessness
-  **Economy and Growth**
Fostering an environment for jobs and prosperity, development supports.
-  **Health and Wellness**
Public health services, bike lanes and pathways, ambulances and emergency services
-  **Governance and Advocacy**
Proactive leadership, fiscal responsibility, open government, advocacy for Niagara
-  **Environment**
Environmental protection, driving sustainable development
-  **Quality of Life**
Safely, community planning, walkability, engagement, newcomer supports

WE ARE HERE



COMMUNITY ENGAGEMENT OVERVIEW



Shape Niagara addresses the importance of incorporating the voice of Niagara's residents and community partners using a multi-modal approach to increase the reach of the engagement initiative.

Why Community Engagement?

Community engagement is vitally important to the development of a strategic plan. Providing Niagara's new Council with what the community sees as priorities will ensure our strategic direction is well informed, and that Council's focus is aligned with the expectations of residents. When residents contribute meaningfully, and are able to see their ideas and feedback represented in the plan, they can take pride in the successes of Niagara.

Principles of Engagement

The following principles underpinned the Shape Niagara initiative:

Accountability

The objective of the initiative was made clear to participants. Summarized feedback will be provided in a final report for Council, for consideration in the development of their 2019-2022 strategic plan.

Transparent

The story unfolded on the Shape Niagara webpage, and was accessible publicly throughout the initiative. The final report will be made public, as will the resulting strategic plan.

Coordinated Approach

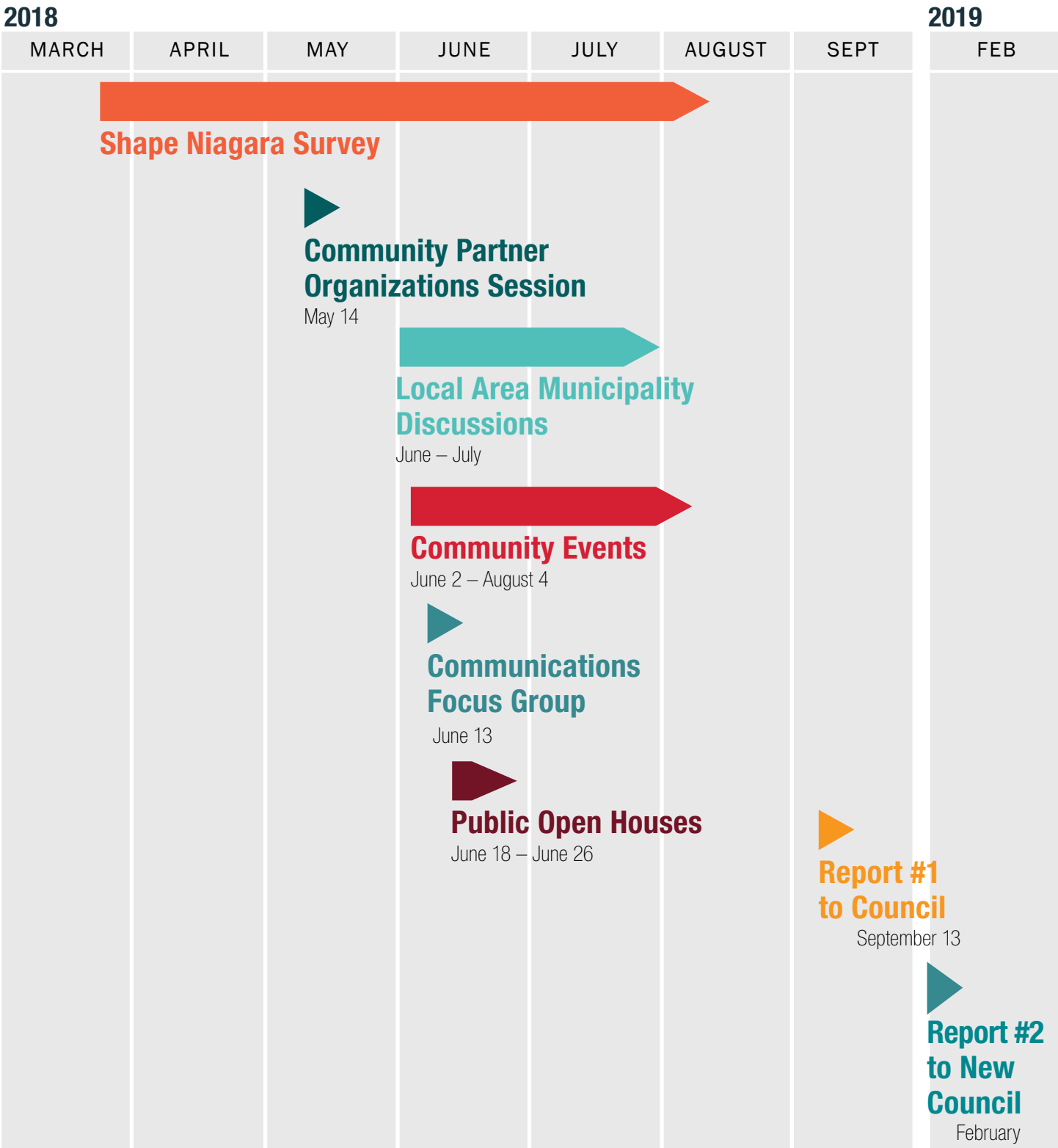
The initiative combines what was heard through Shape Niagara with what the Region has heard throughout the term, incorporating resident feedback collected from other surveys held by the Region.

Inclusive

A multi-modal approach was used to hear from a wide range of residents, businesses, organizations and local area municipalities, using multiple formats including online, and in-person.

Shape Niagara Timeline

The engagement initiative was conducted over the course of a six month period, utilizing multiple types of engagement to ensure a broad reach across the community. Senior Regional staff will be engaged separately in the development of the accompanying background report that will be prepared for early 2019, and again in the planning process with the new Council.



Methodology

The community feedback collected through the Shape Niagara initiative is qualitative, text based data, representing the perceptions and ideas of participants to assist the next Regional Council in identifying and effectively addressing the needs of Niagara and its residents.

Data Collection

Data was collected from the community through multiple engagement methods, capturing open-ended qualitative feedback through online and in-person opportunities as outlined in the Types of Engagement section of this report.

Thematic Analysis

A thematic analysis is one that looks across all the data to identify reoccurring themes and summarize the views collected. In addition to identifying the themes that cut across the data, the narrative within each theme was reviewed, to capture the story and context behind the feedback. Themes were identified using a coding scheme, and a frequency analysis of these codes was conducted.

Frequency Analysis

Frequency analysis refers to how often an idea was identified as a priority throughout the data collected. A triangulation method was used to cross-validate findings by comparing themes collected from each type of engagement. For example, concept or ideas collected from a public open house was also heard within the online survey, at community events or within previous Regional surveys. Hearing themes through more than one type of engagement strengthens confidence in having identified the important issues.

Text Mining Software

Text mining software was used to further explore and analyze the data, to validate and confirm the themes and provide context as identified through the thematic and frequency analysis.

Data Analysis Process



*This report provides a high-level qualitative analysis of the most prominent themes and issues. While it's not possible to include all the detailed feedback received, feedback that was relevant to the objectives of Shape Niagara was analyzed and prepared for consideration in the development of the next Regional Council strategic plan. Feedback relevant to services or projects outside of the scope of the Shape Niagara initiative will be shared with relevant parties as appropriate. The comments collected may not necessarily be extrapolated to the entire population.



INTERACTIONS WITH THE COMMUNITY



The objective of the Shape Niagara initiative was to reach across Niagara to maximize participation and access.



Reach

Recognizing that not all residents are able to attend a scheduled public open house, or may not have access or exposure to the online survey, staff took the initiative to the residents directly, attending 28 local community events, and meeting directly with local area municipal staff (locations shown in the map above). The reach of the engagement initiative was also driven by distribution of business cards, posters, mobile survey access at events (iPads), promotion through our partners and stakeholders, print and online newspaper ads and articles, and through social media platforms including use of the hashtag #ShapeNiagara.

The Shape Niagara initiative received positive traction in the community, stakeholders who saw the importance of the initiative bolstered circulation through grass roots efforts. As an example, one of Niagara's non-profit organizations provided and promoted access to the survey on their premises for clients who may not otherwise have had access to a computer. The initiative was also promoted in a community newsletter that CERF Niagara puts out with distribution to their French speaking networks throughout Niagara. Shape Niagara also received letter and email submissions, validating the recognition by residents and organizations of the importance in being given a voice in this process.

FACEBOOK

 **453**
LIKES

 **104**
COMMENTS

291,261
IMPRESSIONS

 **263**
SHARES

21
POSTS

LOCAL AREA MUNICIPALITY

12 MUNICIPALITIES

6 SESSIONS



PUBLIC OPEN HOUSES

5 OPEN HOUSES

70 PARTICIPANTS

173 UNIQUE QUOTES



3522

UNIQUE WEBSITE
VISITS



STAFF FEEDBACK

128 Unique
Quotes

3 Channels
to submit
feedback



TWITTER

47,162 IMPRESSIONS

483 Engagements

56 times #ShapeNiagara

21 Tweets on Region account



1523

Total Participants



COMMUNITY EVENTS



28 Community
Events



85 Unique
Quotes

Approximately

1500

in-person
interactions

5

FACEBOOK EVENT PAGES

42 Responses



3996 People
Reached



Newspaper Advertisements

5 ads in district
newspapers

9 media articles



PARTNER SESSION



70 PARTICIPANTS

60 Partner
Organizations

16 Topic
Areas

8 Local
Municipalities

19 Business
Sector

10 Education
Sector

25 Non-Profit
Sector

8 Health Sector



ONLINE SURVEY

1002 Survey
Responses

304

Infrastructure
and Services



359

Economy and
Growth



357

Health



433

Environment



242

Governance



337

Quality of Life

of ideas submitted for each Area of Focus



VISION

A photograph of a wooden boardwalk leading to a body of water with a swan, overlaid with large red and teal geometric shapes. The boardwalk is made of wooden planks and has a railing. The water is calm, and a single white swan is visible in the distance. The background shows a line of trees and a small building. The sky is overcast. The image is divided into three main sections by large geometric shapes: a red triangle in the top left, a teal triangle in the bottom left, and a dark teal triangle in the bottom right.

Residents were given the opportunity to provide input to be used to inform a refresh of the Region's vision statement.

Residents were asked to provide 3 words that best describe Niagara



I see Niagara known as a region that is multi-faceted and offers residents full-scale, balanced lifestyles where they can feel they have job security, a full spectrum of community supports for young and old, and options to enjoy the benefits offered by the area's geographic location.

I hope Niagara is known for being a dynamic, environmentally friendly, socially conscious, inclusive city with a thriving and vibrant arts community, world class restaurants and wineries and plenty of things to do. I hope it's a place where young families can stay, make a good living and afford to live.

I hope Niagara is known as an incredibly progressive, diverse, welcoming community that is known for its abilities to work together, listen to each other and collectively create innovative ways of being a community.

I see Niagara known for being an inclusive and equitable community who values all members as part of a rich and fair Niagara

What do you hope Niagara is known for in 10 years?

Niagara will be a thriving economic hub, with a focus on supporting local businesses, and actively recruiting new, diverse industries with a focus on secure and stable opportunities. Niagara will leverage our proximity to major cities in order to create a strong, prosperous economy.



Residents hope to see Niagara maintain its unique traits, focusing on celebrating history, protecting our environment and land assets, and further marketing our natural features. Niagara will leverage our ample greenspaces to increase eco-tourism and become a leader in green industry.



Niagara residents will feel a sense of belonging, and have a high level of engagement regarding local issues. Residents of Niagara will have their voices heard, and together we will shape Niagara into a community we are all proud of.



Niagara will be welcoming and inclusive for all, with superior services with ease of access for all ages and social status; including transportation, community and health services, and opportunities for leisure. Niagara will be an affordable place to live, attracting and supporting diversity.



Niagara will be a vibrant community with ample employment opportunities, allowing youth and young families to plant roots. Niagara will place an emphasis on ensuring urban amenities are available for residents, access to natural space, connectivity and a vibrant arts and culture scene.



What Did Staff Have to Say?

Regional staff were given an opportunity to participate as residents through the online survey. Additionally, staff were asked to comment from a corporate lens with what they think the Region could focus on to better the Region as an organization. Here's what Regional staff had to say:

- Continue to foster cross-departmental collaboration and communication at the Niagara Region to approach issues with a multi-disciplinary focus
- Facilitate opportunities to improve the use of data and idea sharing across departments to ensure evidence informed decision making
- Foster a work environment with a focus on continuous improvement and innovation
- Continue working to improve organizational culture, brand and reputation

Senior Regional staff will be engaged additionally during the strategic planning process and will provide input into the accompanying background report.



WHAT WE HEARD FROM THE COMMUNITY



This section of the report provides an overview of what was heard across each type of engagement method, summarized by the six areas of focus.



Community Partner Organization Session

 **May 14**

Niagara Region works closely with many organizations in the community. These partner organizations were invited to a workshop where participants were asked to provide their ideas around what the Region should focus on from the perspective of their organizations, and more importantly, their clients.

Invitees and participants included local businesses, local area municipal staff, non-for-profit organizations, education sector, health care sector, and community organizations. The Shape Niagara initiative also received written letters of submission from partner organizations, and that feedback has been included in this section.

“

Fostering an environment for jobs and prosperity means more than ensuring employment opportunities are available, it includes encouraging a living wage.

”

Here's What We Heard:



Infrastructure and Services

Safe and Affordable Housing

- Affordable housing solutions inclusive of all residents, including young people, single earners and renters
- Capitalize on funding and development opportunities from higher levels of government
- Ensure affordable housing remains a priority of the housing action plan

Navigating Regional Services

- Streamline navigation for municipal and social services across all levels or providers
- Use data to identify top needs and gaps in services
- Access to services - removing barriers (costs, transportation) for those on low incomes

Transportation Connectivity

- Develop and maintain affordable, accessible transportation to support residents getting to work, school, appointments, and amenities; will also support reduction of social isolation



Economy and Growth

Growing Youth and Young Families in Niagara

- Market employment opportunities to attract and retain young families
- Support youth in developing roots in Niagara as active citizens of the Region

Supporting Niagara's Businesses

- Connect local business owners with tools for success
- Transportation to connect municipalities to support region-wide access
- Foster environment & supports for entrepreneurship and small businesses

Economic Diversification

- Shift focus to innovative emerging clusters
- Align economic strategies across municipalities
- Diversify our tourist sector and developing a collective vision for tourism

Fostering an Environment for Jobs and Prosperity

- Ensure employment opportunities are available, and encouraging a living wage to ensure residents experience better quality of life and improved health outcomes



**1 session | 70 participants
representing 60 organizations**



Health and Wellness

Healthy Population

- Address gaps in senior care, palliative care, addiction and mental health services; creation of a region-wide harm reduction strategy and a comprehensive physician recruitment strategy
- Integration of alternatives to traditional health care delivery models
- Adopt a client-centered, equitable approach to the delivery of public health services, programs and emergency services to support people living on a low income and people experiencing homelessness
- Improve transportation and access to health services
- Ensure a social justice and human rights approach for those living in poverty, to address the attitudes, bias and prejudices to help people move beyond poverty



Environment

Sustainable Development

- Prioritize environmental protection, encourage recycling, protect greenspace and agriculture in the planning process
- Balance sustainability and meeting current needs of rural issues



Quality of Life

Socially Responsible Procurement

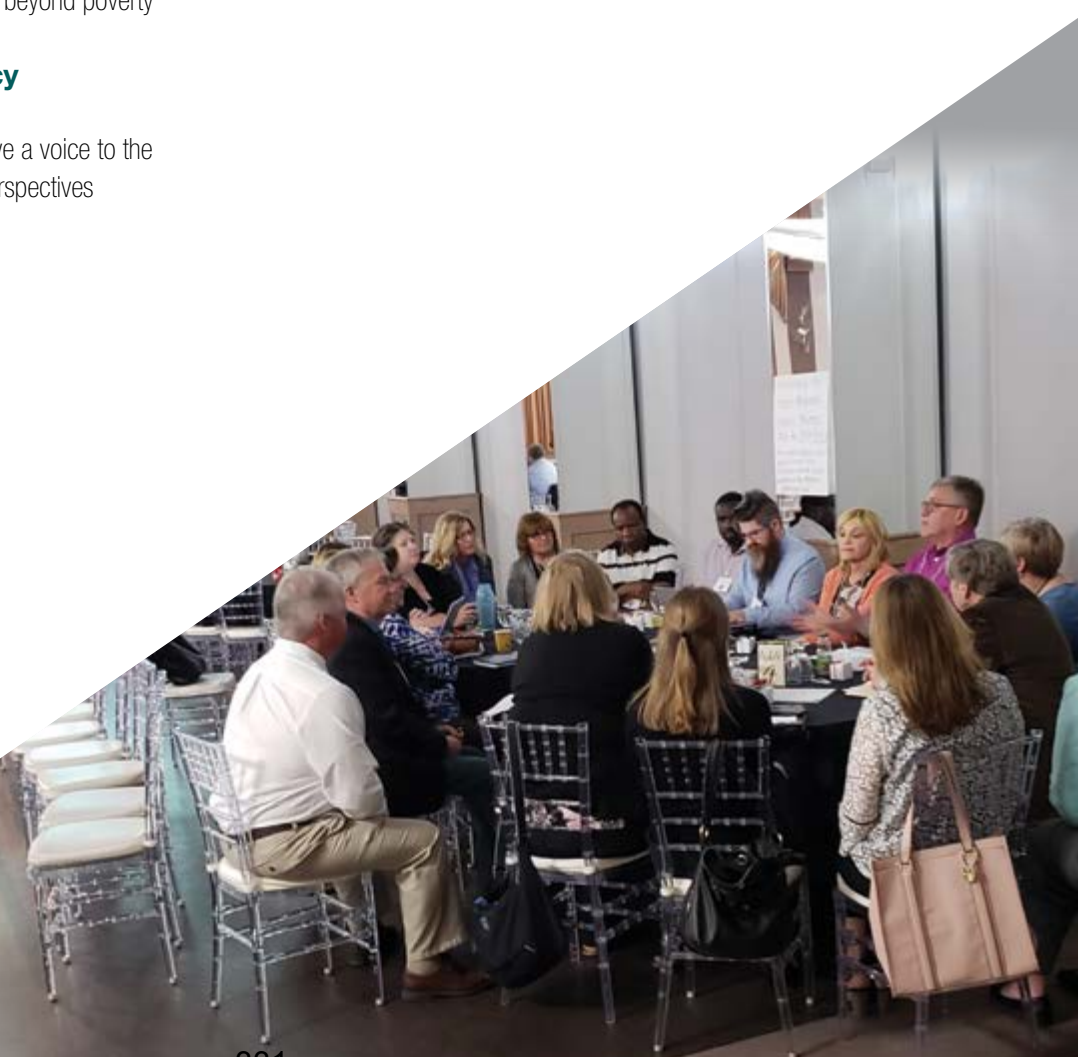
- Support local enterprises for work done through Region's procurement, foster sustainable business practices



Governance and Advocacy

Engaging the Community

- Consultation and inclusion to give a voice to the community, and hear unique perspectives





Public Open Houses

 June 18 – 26

Public open houses were held in five municipalities: Niagara Falls, St. Catharines, Welland, Beamsville and Port Colborne. The open houses were geographically spaced out to cover the major population centers allowing for a wider span of participation and access, shown in the map below. As a public participation technique, the open houses provided a formal drop-in event that allowed attendees to provide comments in person. Staff were there to outline the objective of the events, answer questions and capture the feedback provided by residents who attended.



We need to play off of our current strengths to create a prosperous economy- those strengths being our proximity to the GTHA and border, post secondary institutions and our strong agricultural industry



Here's What We Heard:



Infrastructure and Services

Transportation Connectivity

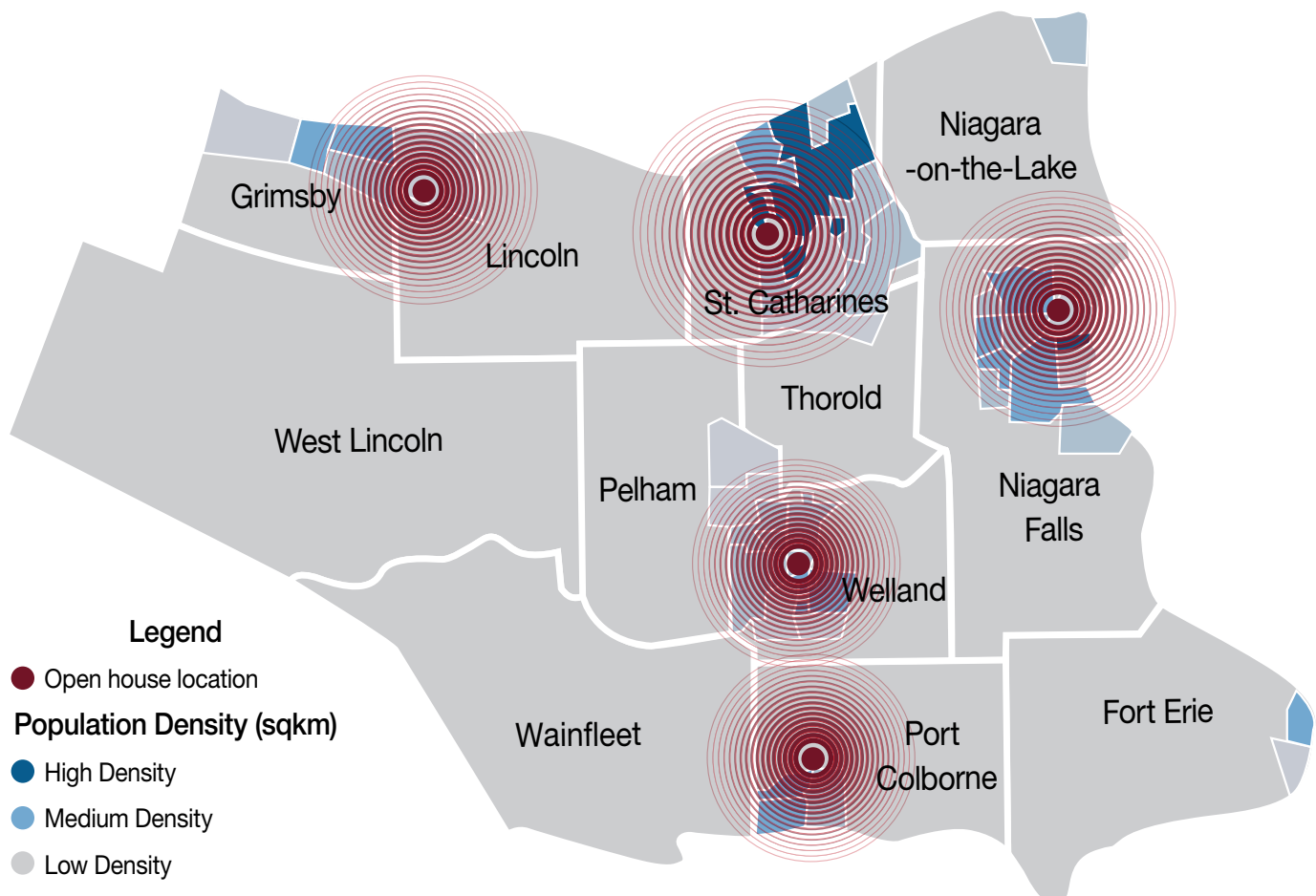
- Improve connectivity between Niagara's municipalities and outside of region

Affordable Housing

- Affordable housing and alternative solutions to combat homelessness

Roads and Bridges

- Improve roads, bridges and physical infrastructure to meet demands of increasing population and traffic flow
- Ensure we are adequately prepared for the expansion of GO to Niagara





5 Open Houses | 70 Participants



Economy and Growth

Socially Responsible Business

- Stimulate our economy through the use of local companies for Regional projects

Marketing Niagara

- Utilize our strengths to attract diverse industry

Business Retention

- Streamline support for development and Niagara's businesses

Youth Retention

- Leverage partnerships with post-secondary institutions to increase youth retention



Health and Wellness

Access to Health Services and Preventative Care

- Improved centralization and access to necessary health services
- Supports for increasing effectiveness of emergency services within our communities
- Integration of public health services; including school outreach, senior services, mental health and addiction support

Active Transportation

- Bike lanes and sidewalks to encourage active transportation



Governance and Advocacy

Accountability

- Open, transparent and accountable governance following a set of standards for conduct

Community Engagement

- Engage residents on boards and committees, as well as throughout decision making processes

Advocacy

- Streamline advocacy efforts to best serve all Niagara residents



Environment

Protection of Natural Assets

- Protect our greenspaces and natural resources

Sustainable Development

- Ensure developments follow sustainability guidelines

Environmental Education

- Increase educational initiatives to ensure residents understand the importance of environmental conservation

Community Engagement

- Consultation with stakeholders to capture voice for preservation of natural assets in Niagara



Quality of Life

Safety

- Police visibility within our communities and at events

Supports for Populations in Need

- Work to support our multicultural growth, supporting newcomers and marginalized populations in Niagara

Sense of Belonging

- Vibrant culture, entertainment opportunities





Community Events



June – August

One of the keys of successful engagement is to make it easier and more convenient for people to participate. The project team took the initiative to places where people were already gathering, setting up at community events and popular destinations. This made it easier for community members to provide their comments and guidance without having to attend a separate meeting, and allowed the initiative to reach more residents and cover more geographic area.

The project team attended a total of 28 community events. Examples of event locations included: Niagara VegFest, Niagara Falls Ribfest, Canada Day celebrations, Pelham Supper Market, Ridgeway Summer Festival, Niagara on the Lake Lavender Festival and Farmers Markets, etc.

“

We need one sustainability framework and goal for the whole region. We need united action to protect the environment.

”

Here's What We Heard:



Infrastructure and Services

Transportation Connectivity

- Comprehensive Region-wide public transportation system, including active transportation options

Roads and Bridges

- Improve quality of Regional roads to match increases in growth

Navigating Regional Services

- Easier access to Regional services and information



Economy and Growth

Youth Retention

- Increase youth retention by providing employment opportunities for recent graduates

Supporting Business

- Increase in support for small businesses, entrepreneurship and existing businesses in Niagara

Diverse Industry Sectors

- Diversify our economic clusters in order to promote economic prosperity, increase average income, reduce precarious employment



32 events | Approx. 1500
in person interactions



Health and Wellness

Mental Health Supports

- Increase access to mental health services for all ages, working to reduce stigma within the community

Preventative Health Care

- Address social determinants of health such as addiction, social services and job stability services, understanding that a healthy social community leads to improvements on a population's physical health

Senior Services

- Improve connectivity between health services for seniors



Governance and Advocacy

Openness and Trust

- Openness, accountability, transparency and trustworthiness on Regional Council

Community Engagement

- Ensuring Council represents their residents by increasing community consultation on important issues, and keeping residents informed



Environment

Sustainable Development

- Better balance between development and sustainability, ensuring experts are consulted prior to development

Education

- Improve education regarding proper recycling and environmental sustainability practices

Protection of Natural Assets

- Protection of wildlife and their habitats, waterfronts and greenspace



Quality of Life

Smart Land Use Planning

- Improve community planning to ensure communities serve their residents across the life course
- Ensure developments are designed with walkability in mind

Support for Populations in Need

- Increase accessibility for newcomers and immigrants, including literature and outreach in multiple languages





Local Area Municipalities



June – July

Niagara's local area municipal (LAM) staff were engaged in a number of ways including an invitation to the community partner organization session, and through attendance at area planners, economic development, treasurers and CAO meetings. All local area CAOs were invited to a facilitated session to capture feedback and generate fulsome discussions, fostering collaboration between upper and lower tier governments.



We need to ensure we are using a unified approach between the Region and municipalities, building on our prior successes. A multi-level approach will lead to a stronger voice for Niagara.



Here's What We Heard:



Infrastructure & Services

Transportation

- Support growth through effective transportation network, corridors to ease congestion (North / South escarpment, mid-pen corridor, integrate existing infrastructure with GO), complete the big tasks we've started: close on GO and airport initiatives
- Effective planning for connectivity - people and goods movement strategy, improve transportation and mobility hubs, transportation and connectivity coordinated amongst all partners, linking active transportation across municipalities (i.e. circle route), explore opportunities with ports in Port Colborne and St. Catharines



Economy & Growth

Planning for Growth

- Integrate diversity into the strategic growth plan, coordinate to attract residents across all of Niagara's LAMs, proactive planning rather than reactive
- Be visionary with land-use planning, using successful cities as an example. A coordinated growth and development plan, growth in the right places, intensification, advocate province to properly designate lands, protect the future of agriculture, educate public / developers on topics such as smart growth and affordable housing
- Recognize LAM differences to meet the needs of municipalities that are growing and also those that are not growing. Working with LAMs on official plans to build a region-wide approach
- Assessment base growth needs to grow away from reliance on residential. Plan and address building stock, inventory, land restriction issues (i.e. wetlands), re-zoning of industrial to residential is affecting future needs





6 sessions | 12 municipalities

Economic Prosperity

- Re-branding of region as a whole to attract new residents and business investment, foster working together to ease competition issues between local municipalities, rural / urban approach such as Durham Region, focusing not only on pushing big sites, but pockets of sites, emulate successes of like-regions, effective incentives with criteria to meet objectives and drive marketability (i.e. we don't need to incentivize where growth is already happening, focus incentives to where the impact will be the greatest)
- Focus on future job market, position Niagara for a new economy, fostering entrepreneurship, diversified economic activity, look at how to increase Niagara's employment participation rate
- Preserve affordability, effective transportation, appropriate servicing to potential areas such as Seaway lands, broadband opportunities
- Partnerships – leverage strengths of neighbouring municipalities (City of Hamilton, GTA, Buffalo), build a labour force for new economy through relationships with post-secondary institutions (i.e. advocate for engineering, advanced manufacturing programs)
- Expand cooperative economic development approach, unified economic development strategy and action plan across the two-tiers, need a business retention and expansion strategy, define role in tourism to reduce confusion and be inclusive of all municipalities



Governance & Advocacy

Inter-Municipal Relations

- Alignment between upper and lower tier priorities, co-operation and / or support between upper and lower tiers, strong inter-municipal relations, align strategic plans to focus on working together to get things done, opportunity for a common or complementary strategic pillar(s)
- Better communication with Regional Council at LAM Councils, fostering working relationships between Region and LAM staff and ensuring alignment of documentation and strategies between the two levels
- Ensure aligned customer service and ease of navigation for residents and staff, warm handoffs between tiers
- Come together with one voice to higher levels of government, collective strategy, approach and advocate as one, all go together
- Asset management planning, investment policies, cooperation between local municipalities and Region mean we can come together to find solutions that all municipalities can use



Communications Focus Group



June 13

The Region's Strategic Communication & Government Affairs division conducts a resident survey with a focus on communication preferences. The 2018 survey aligned well with the launch of the Shape Niagara initiative, and questions that would specifically benefit the Shape Niagara initiative were included in the focus group portion of the initiative.



[Transit] brings people together, makes jobs, improves business and improves tax revenues, and that will make more money available for other improvements.



28 participants over
3 focus groups

Here's What We Heard:



Infrastructure and Services

Roads and Bridges

- Improve road maintenance for new and existing assets

Transportation Connectivity

- Improve public transit system functioning as a single system with one schedule and one fare, incorporation of GO trains into regional system

Affordable Housing

- Housing for seniors and affordable housing

Navigating Regional Services

- Increase accessibility of services across the region



Governance and Advocacy

Accountable Spending

- Accountable spending at the Region and the LAMs

Collaboration

- Communication between the Region and LAMs with common goals

Community Engagement in Development

- Ensure transparency in development plans for residents across all local municipalities



Health and Wellness

Health Care Services

- Improve and expanding mental health services
- Increase support for Public Health services



Environment

Balancing Growth with Sustainable Development

- Concern for loss of greenspace and protecting the rural character of the Region
- Improve planning to match infrastructure with development and community needs



Economy and Growth

Economic Prosperity

- Niagara needs to be a place to not only live but to work in as well, with quality jobs to ensure Niagara is not a bedroom community for greater Toronto and Hamilton
- Secure employment opportunities - priority for the region is job creation, for youth and young families, with higher pay



Online Survey



March– August

The primary tool to collect community feedback was through an online survey accessed through the Shape Niagara website. Participants ranked their top three Areas of Focus, and asked participants to elaborate and identify how they might leverage Niagara's strengths and weaknesses as opportunities.



Improving transportation is necessary. Niagara's communities will be better connected, which will improve everything from employment rates, to the local economy, to health.



1002 survey responses

Here's What We Heard:



Infrastructure and Services

Infrastructure

- Ensure roads and bridges are adequately maintained for safe and timely travel
- Ensure roads and transit system are prepared for the influx of usage with future GO service
- Connective corridors to mitigate the increasing levels of traffic on major arteries

Services for Populations in Need

- Look for innovative strategies to support residents finding safe, affordable places to live
- Supports for homeless population, including housing, health care, addiction support and jobs

Services for Families

- Increase child supports to make Niagara an attractive place to live for young families; lobbying upper levels of government for increased affordable childcare options and public health supports for the early years

Waste Management

- Increase education initiatives to increase organics and recycling, more waste sorting bins in public facilities

Water Quality

- Ensure drinking water resources are adequately protected, maintain current quality; explore solutions to improve water cleanliness at beaches for safe swimming





Economy and Growth

Diverse Industry Sectors

- Attract new and diverse industry to Niagara; use of targeted incentives, and matching businesses with vacant properties
- Drive growth in downtown cores, adjacent to our waterfronts and repurpose brownfields
- Focus on attracting industry in sectors with proven longevity and a high rate of growth

Secure Employment Opportunities

- Need to move away from part-time, seasonal employment; work with higher levels of government to attract secure employment opportunities and reduce precarious employment

Business Retention

- Centralized support for businesses; established lasting connections

Marketing Niagara

- Market Niagara's strengths, such as greenspace, high quality of life and proximity to higher education, to attract both businesses and potential employees.
- Utilize traditional and innovative media channels; create comprehensive region-wide marketing strategy to attract more tourists, investors, future residents and businesses

Youth Retention

- Comprehensive youth retention strategy, fostering strong partnerships between post-secondary institutions and business sector to match local graduates with employment opportunities and ensure education programs fill gaps in the workforce

Collaborative Government

- Create a defined economic focus across all local area municipalities to attract industry, create one set of economic development procedures across all municipalities

Tourism

- Work to expand tourism industry across all municipalities; continue to invest in alternative forms of tourism, such as eco-tourism and sport tourism; and leverage Niagara's strengths

Transportation Connectivity

- Transportation plays an important role in economic growth; centralize future development along highways and the future GO route, and in areas with existing services



[Success is] realized when communities work together, and should not be one-off's. It should be the result of deliberate and consistent effort of key strategic alliances between communities, as well as with the private, education and healthcare sectors.





Health and Wellness

Active Transportation

- Increase in trail systems, cycling paths; ensure safe active transportation opportunities

Preventative Healthcare

- Continued focus on preventative health care to reduce stress on our health system
- Increase focus on social determinants of health such as income equity, homelessness, employment rates, supports for marginalized populations, addiction services and supports and harm reduction strategy
- Respondents indicated that the public is not aware of all of the services provided by Public Health, and suggest improved marketing towards target audiences to increase usage and increase education on important health concerns
- Shifts towards medical centres of excellence require an increase outreach services such as increase in home care, outreach to outlying communities and a stronger network of community organizations to connect residents with available services in their area

Caring for Seniors

- Increase supports for Niagara's aging population: localized health services, affordable senior housing and outreach for older population

Transportation Connectivity

- Work towards a unified transit system to allow all residents to access needed health services, regardless of what municipality they reside in

Mental Health Supports

- Continued focus on mental health issues through services, early intervention and education in schools for youth



Income equity is the key to all wellbeing measures. We need to create a sense of belonging for all citizens, no matter their age, cultural background, or socio-economic background. We need to create opportunities for diverse populations to interact in the community by how it is planned and structured.





Governance

Advocacy & Collaborative Government

- Advocate for Niagara as a whole, attract businesses and new residents by unifying LAM and Regional priorities; Niagara is stronger working together with a common vision, where all viewpoints are valued in decision making
- Increase collaboration between levels of government including collaborative strategic planning
- Regional Councillors co-operating with one another, reducing inner conflict to accomplish all tasks efficiently with integrity

Accountability

- Accountability for Regional Council through the establishment of a clear code of conduct and rules of governance
- A more responsive government, easily accessible to discuss issues with constituents
- Increase presence of Regional politicians at community events, to help build a stronger rapport between residents and their representatives

Community Engagement

- Increase opportunities to have residents voices heard; prior to each major decision or plan, residents would like community consultation sessions where residents, politicians and organizations can have meaningful discussions
- Diverse representation on Regional committees, engage subject matter experts to sit on appropriate committees

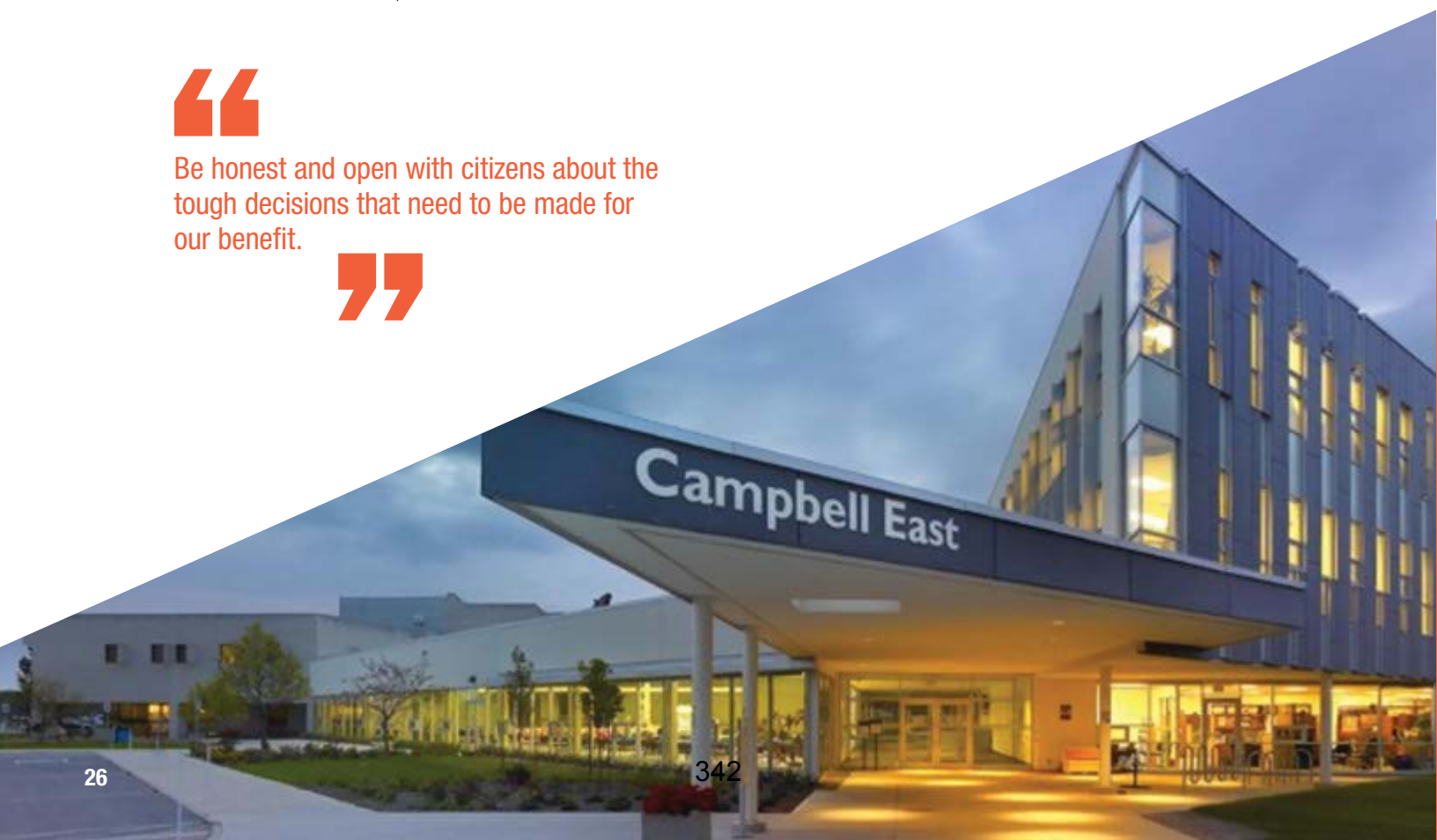
Fiscal Responsibility

- Keep residents informed regarding budgets, spending, decision-making and timelines for Regional projects
- Ensure responsible spending by reducing inefficiencies and duplication. Explore alternatives to our current governance model to reduce overlap of services
- Transparency in spending, with guidelines on appropriate expenses for elected officials

“

Be honest and open with citizens about the tough decisions that need to be made for our benefit.

”





Environment

Protection of Natural Areas

- Respondents were passionate about the protection of Niagara's environment; including wetlands, farmlands and greenspaces; ensure these lands are not subject to zoning changes
- Ensure Niagara's wildlife and ecosystems are protected through the creation of a natural heritage system
- Opportunities to utilize natural areas within the region, including improved access to the waterfront, and an increase of natural areas for physical activity
- Ensure all new developments provide ample park space and green space in their plans



We need both the protection and the sustainable development. It can be done with embracing the gifts we have, and opening our minds to safe, clean, healthy and attractive development, that has a sustainable future.



Sustainable Development

- Ensure future developments are sustainable, focus on infill and developing brownfields as an alternative to urban sprawl
- More stringent rules for developers that plan to build on sensitive lands; focus incentives towards developers that are repurposing current vacant land, and developers that are passionate about preserving our heritage and the environment

Environmental Protection

- Explore alternative energy options to maintain Niagara's clean air; limit the use of fertilizers and pesticides, educate the public on environmental issues, such as recycling, endangered species and composting
- Connected public transit system, to reduce reliance on vehicles and reduce carbon footprint



Quality of Life

Transportation Connectivity

- Create a comprehensive inter-municipal transit system, integrated with the future GO route, to support travel of residents and tourists. Niagara's large geographic area can be a challenge for transit, explore alternative transportation to reach outlying communities
- Improve access and use of active transportation modes, such as walking and cycling

Community Engagement

- Opportunities for residents to provide input into decisions that affect their community

Sense of Belonging

- Foster a greater sense of belonging through community hubs, local tourism opportunities to support interactions between community members, and foster Niagara's unique culture

Responsible Development

- Residents are passionate about the unique features that make Niagara home, ensure natural features such as waterfronts and the environment are protected from over development
- Increase consultation prior to major developments to ensure greater sustainability and the voice of residents is captured

Safe Community

- Safe neighbourhoods greater police visibility, increased lighting, improved monitoring of roads and highways

Supports for Populations in Need

- Ensure the most vulnerable populations such as newcomers, the homeless and those struggling with addiction are adequately supported

Balanced Services

- Balance services to meet the needs of families, business owners and professionals
- Balance of rural and urban priorities to drive a high quality of life

Arts and Culture

- Increase support for arts and culture, including community festivals, galleries and museums
- Protect and restore historic towns and villages to make Niagara more attractive to new and current residents

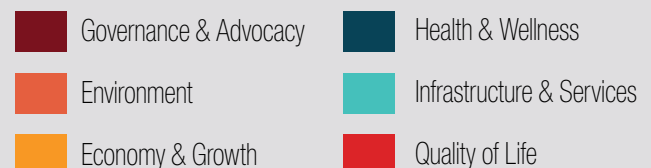
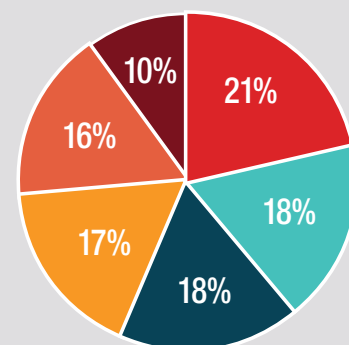


We need to build a better sense of community in Niagara, where people feel they are encouraged to contribute their skills to make life better for everyone.



Selected as Top 3 Priority

Participants were asked to rank the Areas of Focus, this chart shows the proportion of times each Area of Focus was selected as a top 3 priority.



WHAT ELSE THE COMMUNITY TOLD US



A review of recent and relevant surveys hosted by the Region was conducted and pertinent responses were incorporated into the Shape Niagara results to validate what was heard.

Surveys Included:

- Smart Cities Survey
- Niagara Employer Inventory Survey
- Go Hub and Transit Station Survey
- Joint Strategy on Youth Retention Survey



Other Relevant Surveys

Here's What We Heard:

Smart Cities Survey

This survey was conducted to gather insights from Niagara residents about the greatest challenges affecting Niagara that may be improved through data and technology. This data helped to inform Niagara's submission to Infrastructure Canada's Smart Cities Challenge in 2018.



Infrastructure and Services

- Police visibility to foster a sense of safety
- Explore innovative solutions to the housing crisis
- Road and infrastructure to accommodate population growth
- Inter-municipality transit with consideration around jobs and those accessing the service Example: those working in the service industry, with schedules based on demand / usage
- Active transportation opportunities
- Leverage technology to improve maintenance of Regional roads



Economy and Growth

- Focus on attracting new employers to the Region to improve job prosperity
- Support for small and medium sized businesses through a technology hub
- Advocate post-secondary industry to match programs to emerging economic clusters, with a focus on leveraging technology and connectivity
- Support employment opportunities for individuals to work from home in remote locations



Health and Wellness

- Mental health care for all residents, of all ages
- Access to health services for pocket communities
- Support for innovative health services to treat addictions
- Focus on preventative medicine to alleviate stress on the health system and physician recruitment
- Adapt to meet the needs of an aging population through technology



Governance and Advocacy

- Increase opportunities for residents to provide feedback to Regional Council
- One Niagara - unifying strategies across municipalities
- Focus on bottom-up leadership, where government leads from behind to build capacity



Environment

- Focus on sustainable development within the planning process



Quality of Life

- Embrace multiculturalism
- Community engagement and fostering a sense of community belonging for all ages
- Local community hubs
- Improve digital connectivity
- Community planning focusing on proximity between commercial and residential areas

Employer Inventory Survey

The Region conducts annual in-person surveys with businesses across Niagara. Results from the survey contribute to a comprehensive understanding of Niagara's current employment landscape by providing reliable data on employment numbers, types of employment and job / industry locations. Businesses were also asked what the Region could do to support them.



Infrastructure & Services

- Include online information about regional small businesses in the form of a business directory
- Expand public transit service to support employees
- Expand bike lanes in the Region to allow for greater access to stores and workplaces



Economy

- Encourage inter-business networking
- Highlight employment opportunities across the region
- Assist in keeping and attracting business in Niagara



Health & Wellness

- Increase funding for mental health services
- Support cycling and sporting events that will attract tourists, encourage healthy living and increase economic spinoff



Governance & Advocacy

- Continue to promote Niagara as open for business
- Remain politically active in ensuring procurement stays open and transparent
- Promote and support a "buy local" campaign in order to increase public awareness of the importance of Niagara agriculture and farmers
- Streamline permits and approvals



Environment

- Educate and promote usage of garbage and recycling programs



GO Hub and Transit Station Survey

This Regional infrastructure project included a resident survey to capture feedback surrounding the development of GO hubs and transit stations in Niagara. Relevant feedback as it aligns to the objective of Shape Niagara has been captured below.



Infrastructure & Services

- Prioritize active modes of transportation to support increase in density within municipalities



Economy

- Expand business options and create well-designed transit in order to achieve economic success and regional growth
- Increase development in the older parts of the Region to take pressure off of urban sprawl



Health & Wellness

- Encourage active transit to foster a healthy community



Governance & Advocacy

- Integrated transit and infrastructure attractiveness can be used as a way to promote the region to residents and tourists.



Environment

- Consider protection of land and environment when developing transit and infrastructure



Quality of Life

- Support connectivity through integrated transit, pedestrian-friendly communities and mixed-use work and living spaces



Joint Strategy on Youth Retention with Post-Secondary Institutions

This project focused on the creation of a comprehensive, multi-partner strategy with Niagara's post-secondary institutions aimed at retaining and attracting youth.



Infrastructure & Services

- Smart transportation supported by technology solutions; advocacy for active transportation



Economy

- Support for partnerships promoting technology and innovation in the education sector, supporting business and investment attraction
- Support for skill development of Niagara's labour pool
- Promotion of Niagara's health care industry with linkages to other partners and regions



Governance & Advocacy

- Council can continue to encourage the collaborative approach to services and community prosperity Niagara has seen as a result of working across municipalities



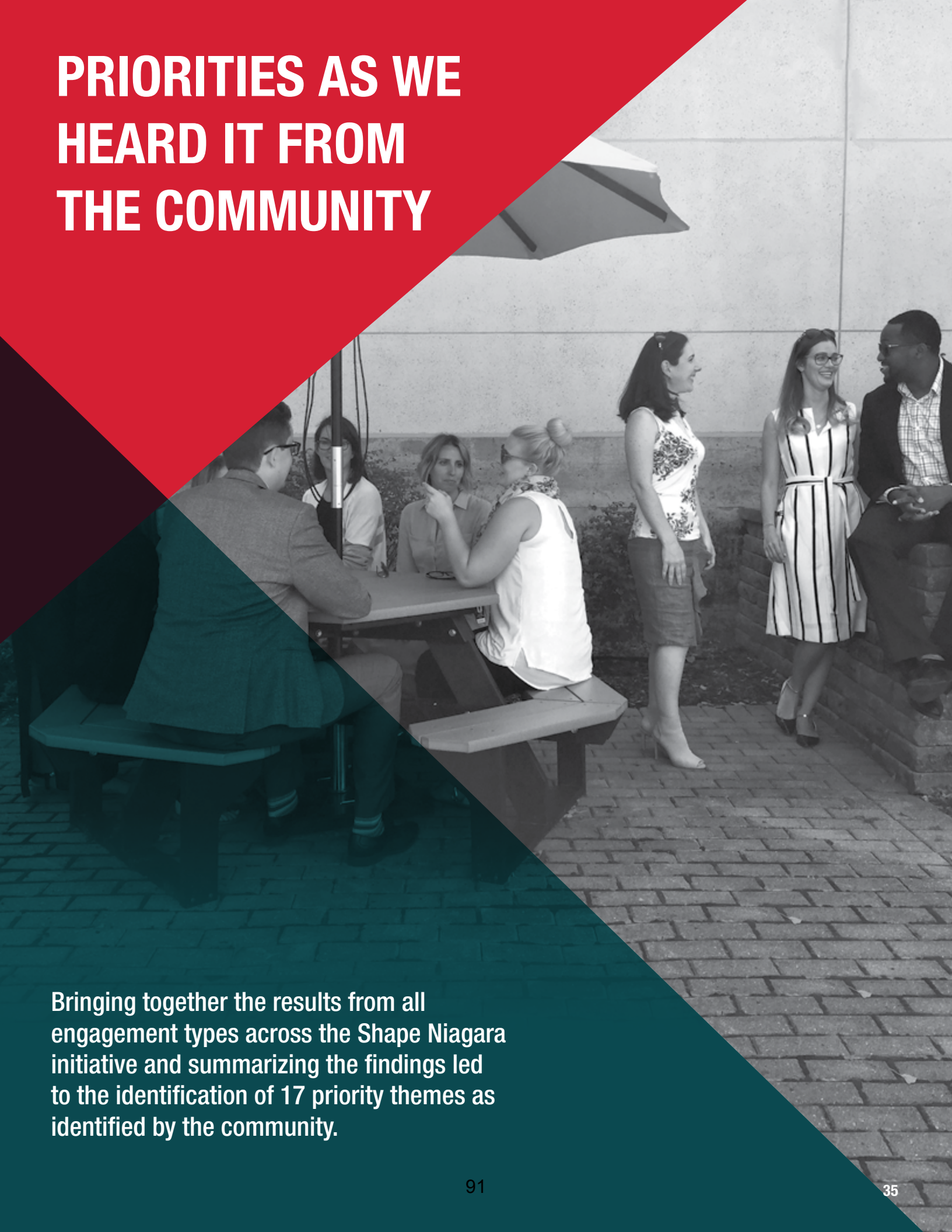
Quality of Life

- Rebrand Niagara to tell the positive stories to improve our image, promote attractions and benefits of living in Niagara





PRIORITIES AS WE HEARD IT FROM THE COMMUNITY



Bringing together the results from all engagement types across the Shape Niagara initiative and summarizing the findings led to the identification of 17 priority themes as identified by the community.

Bringing It All Together

From the analysis of the feedback and data collected, 17 top themes were identified by Niagara's residents, businesses, organizations and local area municipalities. They have been summarized and presented in order of priority, beginning with the most frequently cited.

1 Jobs & Economic Prosperity

- Advocate for, and rebrand Niagara as a whole, create a clear vision in attracting new industry; market Niagara's strengths to attract business through various media channels
- Actively solicit businesses to locate in Niagara through incentives and supports; ensure this business growth is across a wide range of industry; attract businesses that provide non-precarious employment and socially responsible businesses
- Encourage economic growth in downtown cores, brownfields and municipalities that may not traditionally attract industry
- Support small businesses and entrepreneurs to help them thrive
- Use of local companies for Regional projects; i.e. Those hiring local talent
- Partner with community organizations, post-secondary institutions and the business community to strategize economic development opportunities
- Move away from investment in part-time, seasonal and low-paying employment, move towards secure jobs that pay a living wage
- Better understand the link between sustainability in the job market and quality of life of employees (i.e. health care, housing)
- Focus on diversifying our economic clusters (away from tourism and service industries) and shift towards emerging industries, or those with proven longevity (i.e. health, technology)
- Work to consolidate economic focus and drivers across all local municipalities to better refine our economic strategic planning
- Work to ensure all necessary supports are in place to foster an environment for economic prosperity and success through streamlined processes, right-sized taxes, smart incentives directed towards results

2 Transportation Connecting People to Jobs & Services

- Recognize and promote secondary benefits that come with a unified transit system; improved access to health care, improved access to job opportunities across municipalities, reduction in greenhouse gas emissions, improved social engagement and reduction in congestion on major arteries
- Continue with the creation of a comprehensive inter-municipal transit system, integrated with the future GO route
- Ensure current and future transit is accessible, frequent and affordable, routes and schedules matched to needs of users
- Explore transportation alternatives, beyond buses, such as high-speed inter-city rail, ferry services and increasing usage of Niagara's airport



3 Supporting Populations in Need through Employment, Affordable Housing, Transit

- Support populations in need by ensuring necessary services are provided including affordable housing and transportation options, that services such as health care are accessible and that affordable housing needs of the community are met
- Adapt services to meet the needs of Niagara's aging population
- Innovative solutions to address homelessness, unemployment, and addictions
- Populations in need as identified by respondents include seniors, homeless, new residents, immigrants, those experiencing addictions, and vulnerable / marginalized

4 Environmental Responsibility & Sustainable Development

- Environmental protection and sustainable development go hand in hand
- Protect Niagara's greenspace, greenbelt lands, farmland, wetlands by reducing development or sprawl on these lands
- Ensure future developments are sustainable by building on brownfields rather than greenfields; more stringent rules for developers that plan to build on sensitive land; offer incentives and prioritization for developers that are repurposing current vacant land, and to developers that are passionate about preserving our heritage
- Be visionary in response to growth for land-use planning across Niagara, ensuring planning policies and approvals protect Niagara's natural assets and are tied to resident's needs and feedback

5 Accountable & Collaborative Government

- Better collaboration between levels of government, Niagara's needs are best met through a common vision; working together with lower-tier municipalities to create a defined strategic focus for key industries (i.e. economic growth, tourism)
- Continue to advocate for Niagara's needs to upper levels of government, all municipalities advocating together as one, for the needs of Niagara as a whole
- Improve representation of resident needs by ensuring Councillors do not allow partisanship or professional interests to guide decision making
- Work to repair relationship with media and press; restore credibility of Regional Council by acting with integrity and respect
- Improve cooperation between Councillors to accomplish tasks in a timely fashion; implement a clear code of conduct and ethics guidelines; ensure there are repercussions for behaviour that deviates
- Increase diverse representation on Regional Committees by including subject experts
- Increase presence of Regional politicians at community events to foster a sense of two-way communication
-



6 Active Transportation

- Promote utilization of active transportation through the creation of a transit supportive community with bike lanes, pathways, and trail networks integrated with public transportation
- Support connectivity between neighbourhoods, schools and workplaces to ensure residents can safely travel to daily destinations using active transportation
- Design future developments with a community planning lens; ensure new developments have sidewalks and community space

7 Preserving Niagara's Natural Assets

- Concern for loss of greenspace and protecting the rural character of the Region
- Educate and provide incentives for green initiatives and green technology
- Protect and preserve key natural assets including: waterways, farmland, beaches, wetlands, parks and trails, green spaces, wildlife, tender fruit
- Preserve agricultural land and foster sustainable farms; advocate for the agriculture sector and encourage farmers to come to Niagara

8 Infrastructure In Support of Growth

- Improve connective corridors to mitigate increasing levels of traffic on major arteries during peak hours
- Ensure roads and bridges are adequately maintained for safe and timely travel to meet increased usage due to growth
- Ensure infrastructure is matched to growth and development to support upcoming residential, commercial and industrial development (i.e. road expansions, sewage systems, bridges, traffic lights)
- Incorporate new technologies and quality infrastructure (road, bridge, facilities) to ensure infrastructure lasts longer



9 Affordable Housing

- Respondents recognize many issues stem from a lack of affordable housing and want innovative strategies to increase access to safe, affordable places to live for all; a disconnect between available housing prices / rent and earnings is identified
- Affordable housing solutions need to be inclusive of all residents of Niagara (youth and young families, seniors, single / low income earners, those with disabilities, and renters)
- Alternative solutions in connection with affordable housing to combat homelessness, which is perceived as a problem in Niagara

11 Equitable Access to Regional Services

- Improve centralization and access to services across the entire region, services distributed with consideration of means of getting to services
- Continue to focus on preventative programs and services that support equity
- Consider integration of alternatives to traditional health care delivery models including outreach services; advocate for increased funding for our health care system and develop a comprehensive physician recruitment strategy; promote and invest in Public Health and Emergency Services

10 Quality of Life and Public Safety

- Quality of life is defined by respondents as being connected to their community, having access to housing, and feeling safe
- Respondents feel strongly about creating a sense of belonging for all residents and highlighted the need for inclusivity and empowering diverse populations
- Increase community belonging for residents and tourists through community and cultural events, festivals, supporting the arts, and preserving the cultural history of Niagara
- Police visibility and upstream police interventions to foster a feeling of safety
- Modifications such as lighting, increasing walkability and transit options will make people feel safer and more connected to their community



12 Water & Waste Management

- Protect natural environment through responsible waste diversion and water treatment; educating public on these matters
- Use technology to be the leader in recycling and water conservation
- Increase uptake of recycling by allowing for more items to be recycled and identify ways to reduce or ease sorting requirements by households

13 Tourism as an Economic Driver

- Respondents are proud of Niagara's strong tourist sector; expand this industry across all municipalities utilizing a collective vision and defined roles
- Promotion and preservation of natural, agricultural, and historical sites which bolster Niagara's quality of life and attractiveness
- Leverage strengths by continued investment in alternative forms of tourism, such as eco-tourism and sport tourism
- Tourism and transportation are intrinsically linked; better transportation infrastructure supports tourism

14 Communication and Engagement with the Community

- Increase opportunities for residents to have their voices heard; respondents want to see their input being incorporated and the impact of their voice
- Ensure Regional government is transparent; open communication and engagement with residents and stakeholders on decisions that affect their community with consideration for all the different needs of the community (marginalized or specific population segments, wildlife, natural assets, rural and urban needs)
- Easier access to Regional and municipal information and services including physical access and improved navigation; align customer service and ease of navigation between Region and LAMs
- Increase opportunities to create a sense of community



15 Youth and Young Family Retention

- Support a comprehensive youth retention strategy to retain a qualified labour force, meeting future needs of industries and economic growth.
- Retain youth and young families by fostering strong partnerships between post-secondary institutions and business sector to match local graduates with employment opportunities; ensure education programs fill gaps in the workforce; foster creation of new, quality jobs in emerging sectors such as technology; create an entrepreneur and technology friendly region
- Attract youth and young families through marketing of employment opportunities; provide supports and promote reasons for young people to start or bring families here
- Ensure that input from youth and young families is used to focus retention efforts and validate the needs of the generation

17 Mental Health Services

- Ensure comprehensive mental health services are available in a timely fashion; targeted services for seniors, children and young adults
- Improve accessibility to mental health services through localizing services in community hubs, allocate mental health staff to outreach programs, programming in schools
- Work with all levels of government to create a comprehensive mental health strategy in provision of services and to reduce stigma
- Foster improved collaboration between organizations that provide mental health services to best service all residents; Region can act as a leader in forming a network and marketing available supports

16 Responsible Spending

- Respondents would like to be better informed on where their tax dollars are going through increased transparency in government spending, budgets and decision-making
- More stringent guidelines as to what are appropriate expenses for elected officials, and what are appropriate expense amounts
- Ensure the reduction of inefficiencies and duplication is a priority; re-evaluate the current governance model to reduce duplication between Regional and LAM services



Concluding Remarks

This report is the first of two that will be provided to the next Regional Council. This first report provides Council with a summary of What We Heard through the Shape Niagara community engagement initiative. It will be accompanied by a second report, a background report, which will provide an overview of the current state of the Region and current influencing factors such as provincial, federal and global considerations. With this information in hand, the next Regional Council will develop their strategic plan for the 2019-2022 term of Council, and an implementation plan will be created which will identify how the Region will accomplish the objectives set out for themselves.

Where We Go Next

PHASE 1
Gather Data

PHASE 2
Stakeholder
Engagement

PHASE 3
Inform New
Council

PHASE 4
Develop
Strategic Plan

PHASE 5
Approve &
Implement

Following this report, the second background report will go to the new Council in 2019 to inform the development of their strategic plan. Once the new Regional Council develops this plan, it will be made available to the public on the Niagara Regional website:
www.niagararegion.ca/priorities.



“

I would like to see the region known as a place where you can live anywhere within it and be able to stay there for your entire life because the job opportunities, transportation, public facilities, and living accommodations will meet your needs.

”

We would like to thank everyone who took the time to participate in the Shape Niagara community engagement initiative. An accompanying background report will be provided to the new Regional Council in early 2019, and will inform the development of the 2019-2022 Council strategic plan.

Once the plan is developed, it will be available along with progress reports throughout the term at:

niagararegion.ca/priorities



SHAPE NIAGARA

SETTING THE STAGE
FOR STRATEGY



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OBJECTIVE OF SHAPE NIAGARA

Shape Niagara will serve to provide background information combined with stakeholder feedback to inform the development of the 2019-2022 Regional Council strategic plan.

This report is the second of the two Shape Niagara reports, and presents background information collected through an environmental scan, and provides a review of upcoming departmental initiatives as they relate to the priorities as identified by Niagara's community through the first Shape Niagara report *What We've Heard*.

Shape Niagara – *Setting the Stage for Strategy*

The second of two Shape Niagara reports, *Setting the Stage for Strategy* presents background information collected through an environmental scan and data such as Global, Federal and Provincial trends. It provides a review of departmental objectives and initiatives linked to the 17 community priorities captured in the first report, *What We've Heard*.

The combination of the two Shape Niagara reports will act simply to inform Niagara Regional Council as they embark on the development of their own priorities and goals.

The release of this second report captures PHASE 3 of the process outlined below:



Methodology

As part of this background report, an environmental scan was conducted, including but not limited to a review of the items outlined below:

- Discussions with senior leaders across the organization
- Key internal corporate priorities, plans and documents
- Key documents released by local, national and global agencies, organizations, post-secondary educators (Including, Chambers of Commerce, Niagara Workforce Planning Board, Living in Niagara)
- Strategic plans of Niagara's local area municipalities (where available)
- Discussions and document reviews of other Ontario municipal strategies
- Provincial activity and discussions with local Members of Provincial Parliament (MPP)
- Federal government documents and policy briefs

What Comes Next?

Armed with the information from the two Shape Niagara reports, Regional Council will work through the process of developing their 2019-2022 strategic plan in the first quarter of 2019, and a resulting implementation plan.



Re-Cap of First Shape Niagara Report – What We’ve Heard

The first of the two Shape Niagara reports, *What We’ve Heard*, focused on input as heard from Niagara's residents and organizations through an extensive community engagement initiative, which began in March of 2018 and concluded in August of 2018. The initiative utilized online and in-person methods to collect information from a diverse range of community stakeholders including:

- Residents
- Community Partners
- Organizations and
- Businesses

We spoke directly with all 12 of Niagara's local area municipalities through:

- Area Economic Development Officers meeting (Team Niagara)
- Area Planners meeting
- Area Treasurers meeting
- Workshop with local Chief Administrative Officers (CAOs) / General Managers (GMs)
- A Partner Organization facilitated workshop (businesses, non-profits and organizations, post secondary institutions, local area CAO's)

Reach



ONLINE SURVEY
1002 Survey Responses



1523
Total Participants



COMMUNITY EVENTS



28
Community Events

44 85
Unique Quotes

Approximately

1500

in-person interactions



PUBLIC OPEN HOUSES

5 OPEN HOUSES
70 PARTICIPANTS
173 UNIQUE QUOTES



PARTNER SESSION

70 PARTICIPANTS

60 PARTNER ORGANIZATIONS

16 TOPIC AREAS

25 EDUCATION SECTOR

8 LOCAL MUNICIPALITIES

19 BUSINESS SECTOR

10 EDUCATION SECTOR

8 HEALTH SECTOR

Staff collected information from over 1500 members of the community, including input from non-profit organizations representing the broader voice of their clients. The *What We've Heard* report identified 17 community priorities, ranked in order of frequency (Priority 1 being the most frequently identified). A full summary of the 17 community priorities can be found in the *What We've Heard* report, which can be downloaded at niagararegion.ca/priorities.

Residents were asked to provide three words that best describe Niagara:





GLOBAL TRENDS

The background of the page features a black and white photograph of numerous flags flying from tall, silver flagpoles. The flags are of various designs, including some with stars and stripes. A large, diagonal red shape covers the top-left portion of the image, and a teal shape covers the bottom-left portion, creating a modern, graphic design.

Municipalities are easily influenced by opportunities or changes that are happening at a global level. Particularly with Niagara's location, global activities such as trade corridors, or the changes currently happening in the United States can have an impact.

Global Priorities and Trends

A comprehensive summary of current global themes were recently presented at the 2018 Niagara Economic Summit. Relevant themes include opportunities in technology advances, SWIFT broadband, innovations in policy and services, and a review of how communities are evolving across the globe.

Digital Economy

The “digital or gig economy” is a term for economic transactions, interactions and activities that are based on digital technologies. With the rise of companies like Uber and Airbnb, there has been an increasing shift towards these temporary employment opportunities. While the gig economy allows workers to easily obtain jobs, it also creates a decline in traditional jobs, moving towards more precarious employment lacking permanency, consistency or health care benefits.



Increased Quality of Life

Quality of life is defined as the degree to which an individual is healthy, comfortable, and able to participate in or enjoy life events. Residents are more often looking for ways to feel connected to their communities and strive for a high quality of life.



Emerging Anti-Social Society

Social media has brought a new-found level of connectivity, while simultaneously creating an anti-social society. It is changing the way people interact with each other and gives people a brush to paint themselves as they wish to be seen.



Contamination Of The Natural Environment and Climate Change

With increased recognition of the effects of climate change including drought, severe weather, and extreme heat, there is a movement to mitigate the effects. Mitigation techniques can range combinations of land use and technological change, reforestation and carbon capture efforts. Resiliency planning is emerging with weather changes as they affect municipal services.



Shifting Dynamics in Privilege and Marginalization

Supporting marginalized populations, building an inclusive society that empowers and supports marginalized groups and individuals is something that is becoming an emerging priority globally.



Erosion Of Culture And History

With globalization comes a blending of cultures and dilution of traditional history. Remolding has positives and negatives, and stems from the intent of improving living standards of all citizens.



What's Happening in the United States

Recent trade negotiations between Canada and the United States have led to a replacement of the North American Free Trade Agreement (NAFTA) agreement, leading to the negotiation of the United States–Mexico–Canada Agreement (USMCA). The close proximity of the Niagara Region to the United States means that trade has a profound impact on our Region. The new trade agreement affects multiple sectors:

Manufacturing

Changes have been made to provisions in manufacturing to discourage the outsourcing of work to areas with more affordable labour costs, changes to the minimum part requirements made within a region, and minimum wage requirements.



Agriculture

The USMCA grants American dairy farmers a percentage of Canada's market; these concessions will have negative impacts on the Niagara Region's dairy farmers.



Retail

The USMCA raises duty-free shopping limits when entering Canada from the United States. This increase in allowance may have impacts for local Niagara Region businesses, as it promotes cross-boarder shopping.




Steel and Aluminum Suppliers

The imposing of tariffs on steel and aluminum imports into the United States from Canada are an area of which the Federal government aims to re-negotiate. These tariffs will affect Niagara by increasing supply costs for local construction projects, and could negatively affect local businesses producing these materials.



NATIONAL TRENDS



Niagara can mimic or be influenced by national trends, just as any local community across Canada. The following section provides a summary of what is happening at the federal government level, as well as some Canadian economic trends.

Federal Government Priorities

The current Federal Government has identified their top priorities for Canada, and a summary of relevant priorities are outlined below:

Economic Growth

Encourage innovation, trade and the growth of Canadian businesses, focus on research-based decision making for agricultural and traditional fields. Promote global trade and investment by strengthening the Canadian brand.



Supporting Canadians

Support Canadians by making post-secondary education more affordable and increasing the number of good paying, high quality jobs for young workers. Enhancement of federal income support programs for parents and families, and in support of affordable housing.



Fighting Climate Change

Work to protect our natural assets including our freshwater, oceans, coastal areas, marine life, national parks, and endangered species. Work collectively to make Canada a leader of international efforts to combat climate change.



In addition to these major priorities, the federal government is focusing on:

- Improving the sustainability of infrastructure
- Ensuring a diverse and inclusive Canada
- Supporting the mental and physical health of Canadians
- Improving government services and operations with a fair and open lens
- Ensuring Canada's support of human rights and equality worldwide

Canada at a Glance

The Canadian Chamber of Commerce released a report that outlines ten ways to boost Canada's economy, many of which align with Niagara's strengths or opportunities. Relevant goals include:

Ways to Build a Canada that Wins (2018)

Make Canada a magnet for business investment

Ensure a globally competitive North America, make Canada a global innovator

Make Canada an agri-food powerhouse

Develop agile workforce strategies

Make all of Canada an Export Gateway

Ensure the unrestricted movement of goods and people across Canada

Help Small-Medium-Enterprises trade and grow

Canadian Chamber of Commerce, "Ten Ways to Build a Canada that Wins" (2018)



U.S. News and World Report, Best Countries Report (2019)





PROVINCIAL TRENDS

The Provincial government has a clear focus on reducing the budgetary deficit that currently exists in Ontario. However, this government has not yet made clear the exact programs, funding streams and initiatives that may be cut to achieve this reduction. These changes will have direct impacts on the Region's services and will be identified as more information is rolled out.

Provincial Government Priorities

A preliminary detailing of the PC provincial government's platform and an action plan entitled The Ontario Economic Outlook and Fiscal Review 2018 was reviewed, and the identified priorities and actions that may be relevant are outlined below:

Repeal of the Green Energy Act, cancellation of renewable energy projects

Cancellation of the cap-and-trade carbon tax, and a commitment by the province to join a coalition of provinces opposing the Federal carbon tax framework

Repeal of Bill 148 on minimum wage, and shutting down the Ontario College of Trades

Creation of 6,000 new long-term care beds across Ontario, promise of 9,000 additional beds

Development and implementation of a Housing Supply Action Plan to address barriers in home ownership and rental housing

Reduction of red tape for businesses

Expansion of natural gas and broadband networks to rural and remote communities

As more details of the decisions and impacts made at the Provincial level are released, affected departments will discuss these impacts with Council directly.

Comments from Niagara's MPP's

Regional staff spoke with three out of four of Niagara's Members of Provincial Parliament (MPP), all provincial parties recognize a need for a renewed focus on job creation and economic development. Niagara's MPPs have suggested that Regional Council work collaboratively with them to advocate for Niagara's unique needs. Opportunities where collaboration with MPPs would benefit Niagara include increasing long term care funding, finding solutions for Niagara's affordable housing needs, and ensuring adequate environmental protection for Niagara's unique biosphere. MPP's welcomed the idea of increased collaboration efforts through regular local meetings, improved data sharing, more frequent joint meetings with Ministers, press conferences or letters of support. They drive home the message that by working together with a Niagara-first mindset, elected officials can best serve all constituents.

Comments Received From: Jeff Burch, Wayne Gates, Sam Oosterhoff

Ontario at a Glance

According to the Ontario Chamber of Commerce, expected movement in the Ontario economy include increases in business investment, industrial and commercial activity, machinery and equipment spending. The labour force skill gap still exists, and companies are unable to find the right people to do the jobs. This issue is not expected to change in the near future, and it is a priority for many organizations and levels of government.





NIAGARA AT A GLANCE

This section provides an overview of Niagara's current state through an environmental scan, and provides a review of relevant Niagara-specific information.





Local Area Municipal Priorities

With Niagara's 12 local area municipalities (LAMs), there are a diverse range of community needs and expectations. Throughout the Shape Niagara initiative, it has been heard that the Region needs to work collaboratively, and Niagara's LAMs are significant partners.

Key priorities of senior leaders at the LAMs include:

- Alignment between upper and lower tier priorities
- Cooperation and support across levels of government in Niagara
- One voice and a collective focus

In addition to speaking directly with local municipal staff, the most current LAM strategic plans were reviewed (as available at the time research was conducted). Ten out of 12 LAM strategic plans were available for review, and although local municipalities have different mandates and services than the Region, there is alignment in key areas between the two levels of local government. The following alignments between local and regional government were identified:

Strategic Priority	Number of LAMs that have Priorities Aligned with Region
 Economy	10/10
 Resident Life	10/10
 Service Delivery	10/10
 Transit Active Transportation	7/10

Local Area Municipal Strategic Plans (2018)

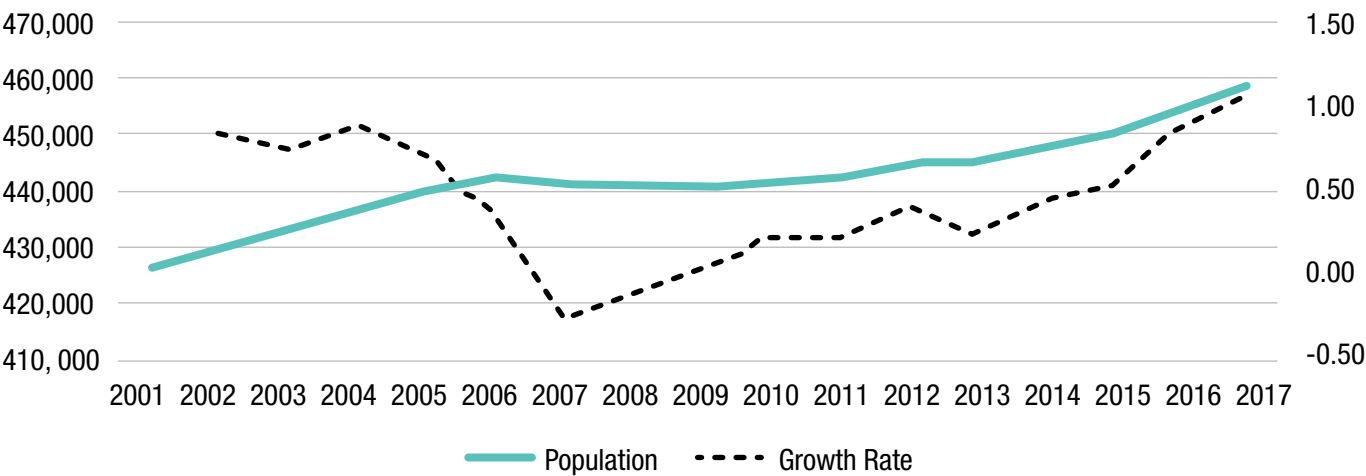
“We need to ensure we are using a unified approach between the Region and municipalities, building on our prior successes. A multi-level approach will lead to a stronger voice for Niagara.”

Population Growth

Niagara saw more population growth than it has seen in over a decade as it increased by 4,829 people (1.06%) to 458,986 residents between 2016 and 2017 (Niagara Region End of Year 2017 Growth Monitoring Report, May 2018). While Niagara is seeing progressively better growth over the last several years, it is happening at a rate much slower than the province (4.6%) and country (5.1%). Niagara's immigrant population has decreased from 18.1% to 16.6% between 1996 and 2016; between those two time periods, Niagara has only attracted 700 immigrants to the region (Statistics Canada, Niagara Region Census, 2016).

Growth in Niagara over the next 25 years is projected to be an additional 150,000 people (from 447,000 (2016) to 597,000 (2041), (Municipal Comprehensive Review Phase 4 forecast, 2018). Niagara will need to identify a sustainable path forward that will ensure affordability to residents while being prepared for the growth ahead.

Population and Growth Rate



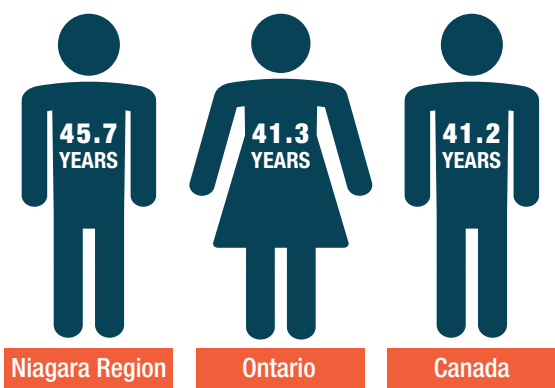
Statistics Canada, Annual Population Estimates (2001-2017)



Aging Population

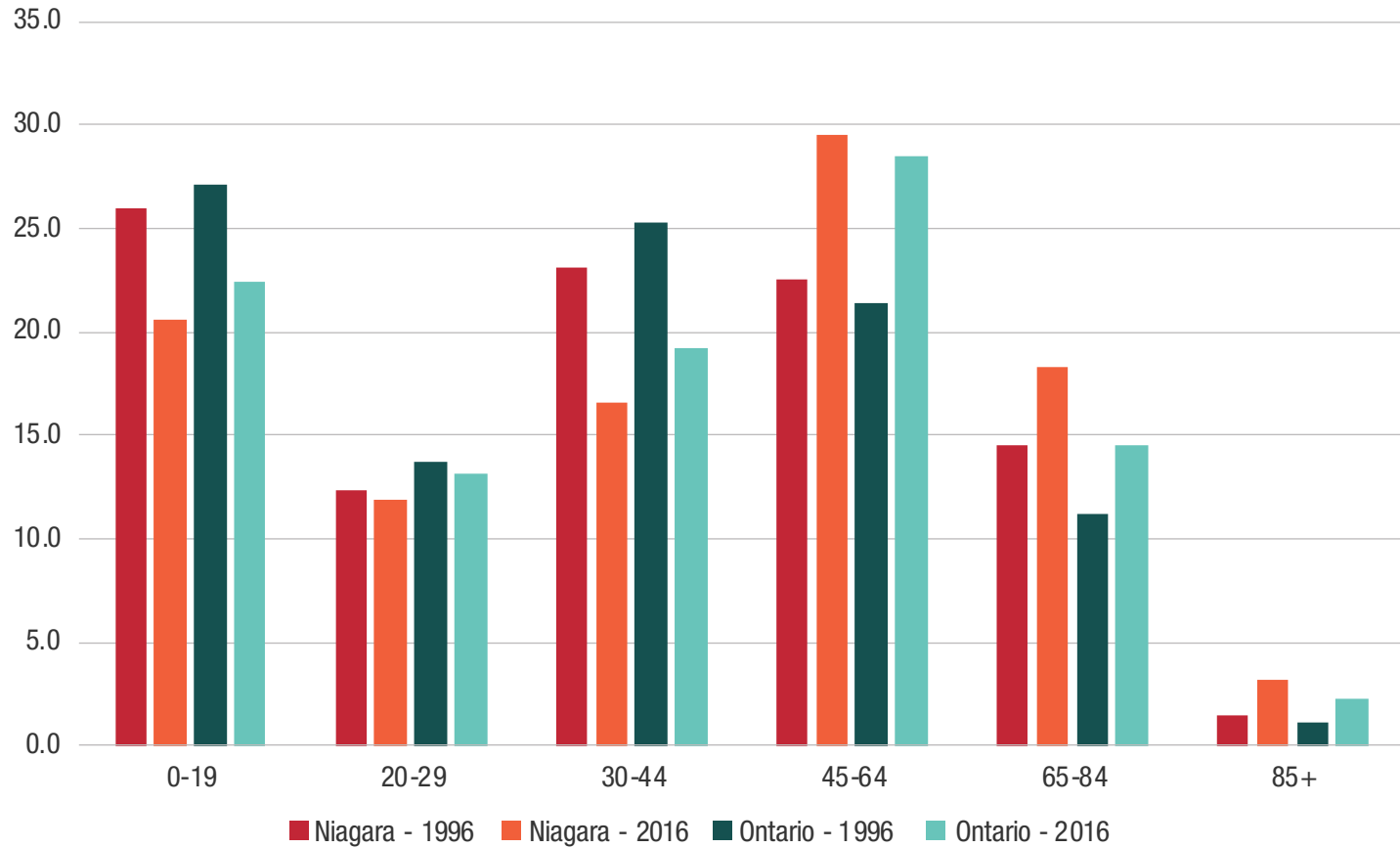
Niagara’s population of seniors is expected to more than double by 2041 (Niagara’s Transportation Master Plan, 2017). Niagara has one of the oldest populations in Canada with more elderly than youth (Statistics Canada, Niagara Census Profile 2016) and is noticeably higher than the province overall. Over the last twenty years, the 30-44 and under age cohort has decreased significantly while the 45-64 and 65+ age cohorts have increased across Niagara and the province. There will be a need to focus on increasing Niagara’s working age population, particularly the 30-44 cohort. Niagara will also need to continue to adapt to the needs of the aging population through services offered at the Regional level.

Population’s Median Age



Statistics Canada, Median Age (2016)

Then and Now, Niagara vs. Ontario



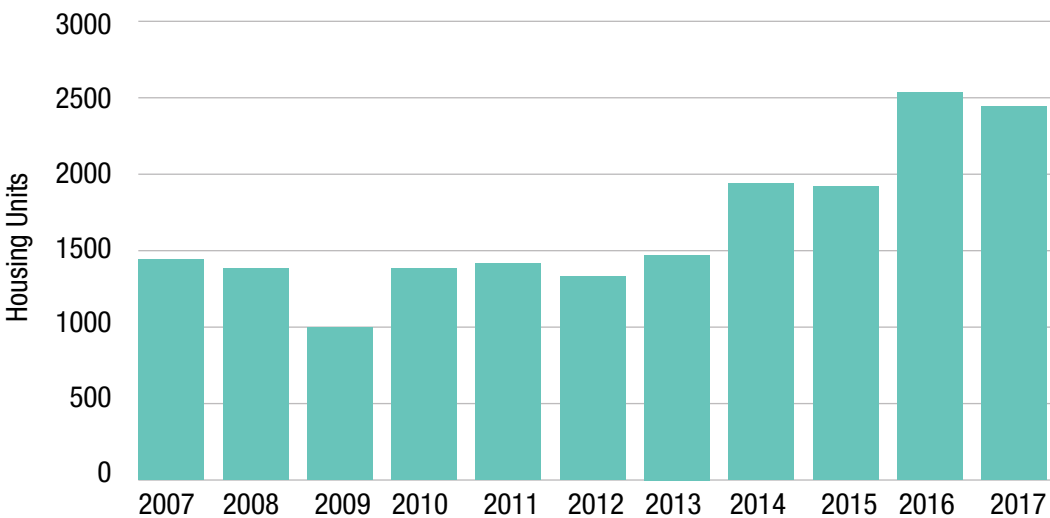
Statistics Canada, Niagara Census Profile (1996, 2016)

Physical Environment

Housing Starts

Similar to trends in population, housing starts have been rising since 2009, reaching a 26 year high in 2016 of 2,530 units. While 2017 was slightly lower than 2016, housing starts have been occurring at much higher rates when compared to just five to ten years ago. Housing starts will need to increase to meet Provincial forecasts and average out to over 2,600 units per year (Canada Mortgage and Housing Corporation, 2018).

Housing Starts



Canada Mortgage and Housing Corporation, Housing Now Tables (2018)

Land Supply

Quantifying vacant developable land is a core component of growth management and ensures that Niagara’s municipalities have an adequate supply of designated urban land to develop. As of the end of 2017, Niagara Region had 2,002 hectares of vacant and developable residential land and 1,553 hectares of employment land. The vast majority of developable land is in municipalities outside of the Greenbelt (Niagara Region Planning and Development Services, 2017).

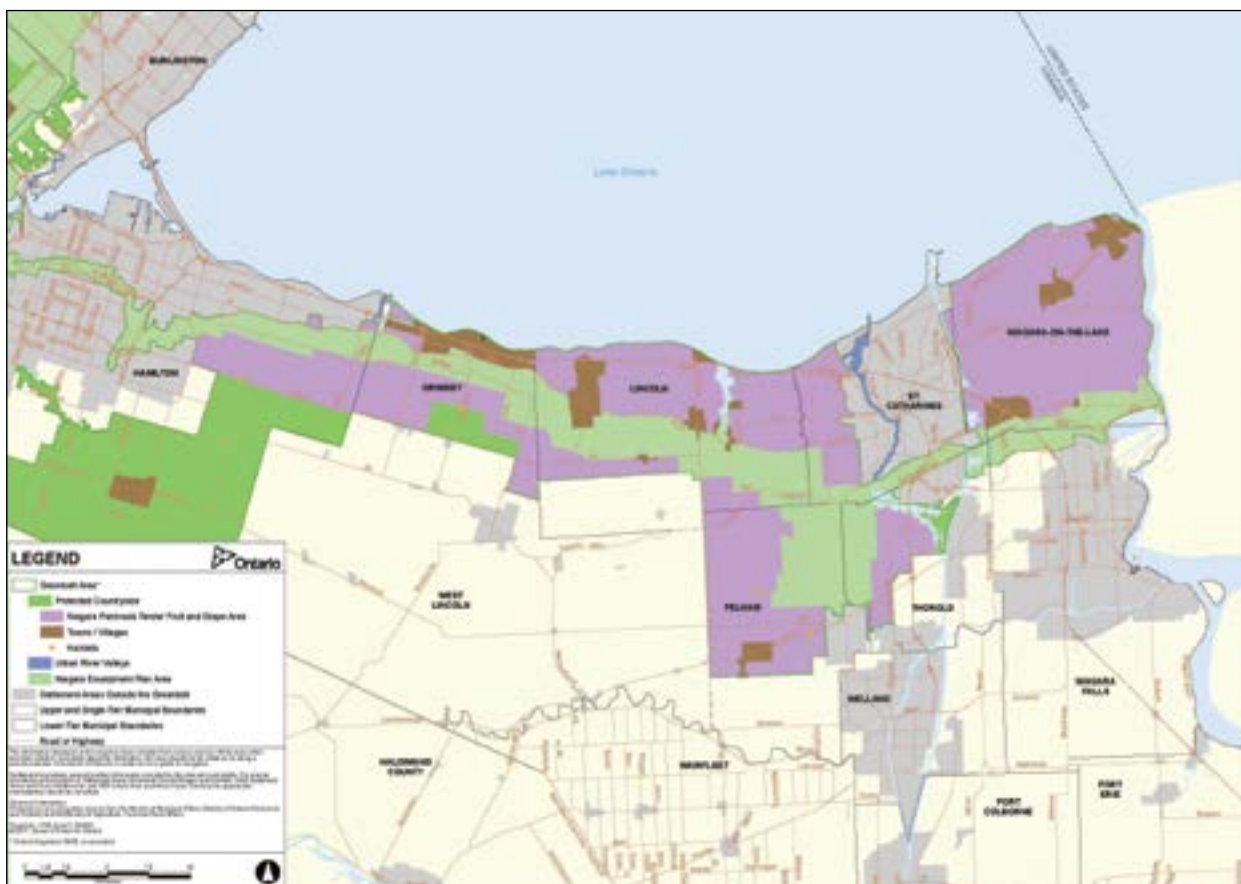


Greenbelt

The Niagara Escarpment is part of the Greater Golden Horseshoe's most ecologically significant natural environments. The Greenbelt Plan is an overarching strategy to provide clarity regarding urban structure, where and how future growth should be accommodated, and what land must be protected. The Greenbelt Plan protects land and provides guidelines for the following purposes:

- Agricultural viability and protection
- Environmental protection
- Culture, recreation and tourism
- Settlement areas
- Infrastructure and natural resources

Greenbelt Plan



Ministry of Municipal Affairs and Housing, Greenbelt Plan (2017)

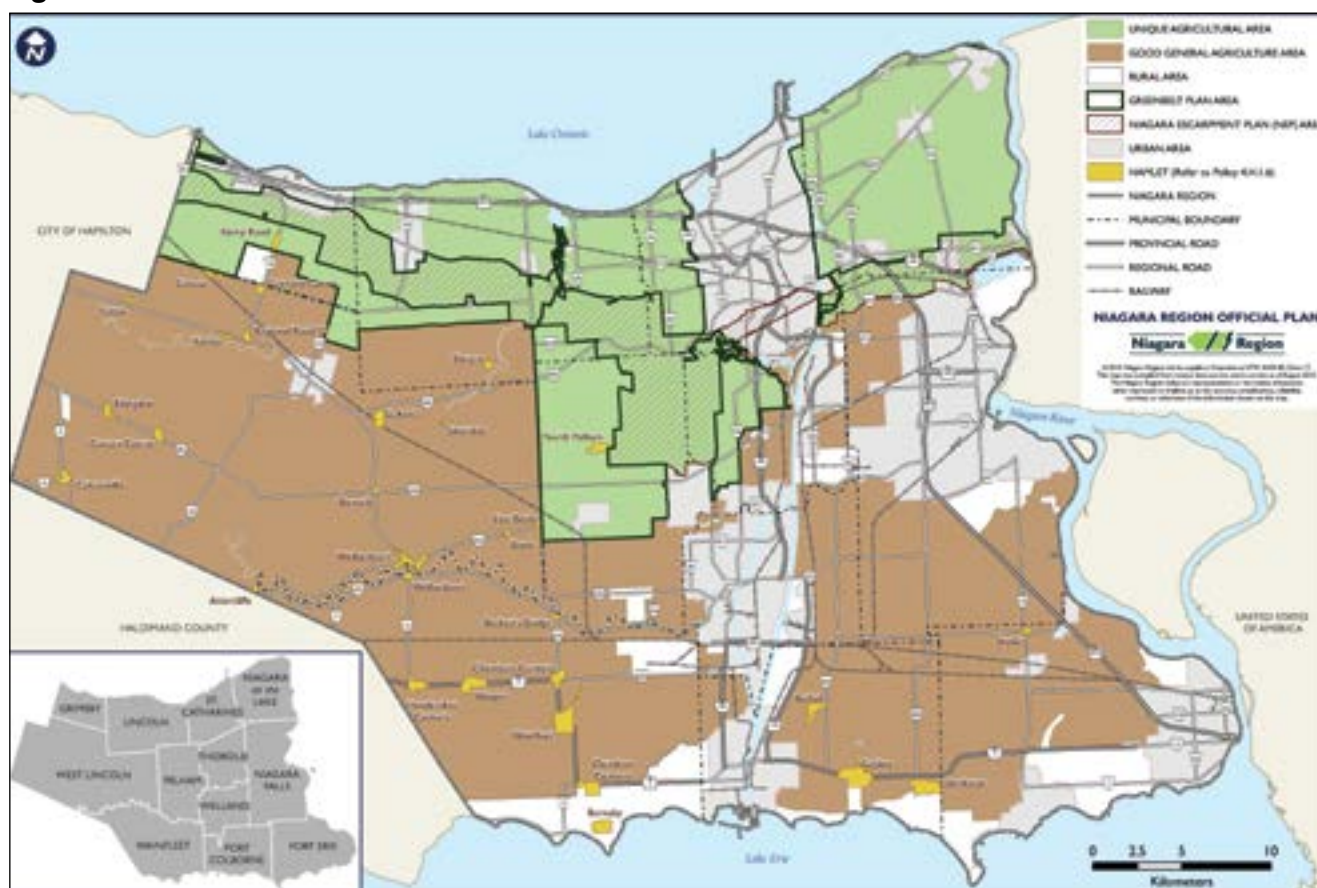
Brownfields

Brownfields are vacant or abandoned lands within an urban area where past industrial or commercial activity occurred, and that have potential for redevelopment. Redevelopment or restoration is complicated by real or potential environmental contamination, building deterioration or inadequate infrastructure. Encouraging brownfield development has been an ongoing priority for Niagara.

Agriculture

Agriculture is a fundamental pillar of Niagara's economy due to climate, land and soil makeup, experienced operators and research capability. In 2016, agriculture in Niagara contributed 19,900 jobs, and is home to over 1,800 farms and agricultural operations. Niagara is responsible for 90% of grape production in Ontario, and is the largest wine producing region in Canada. Between 2011 and 2016, average farm revenues have increased by 47%. (Statistics Canada, 2016)

Agricultural Land Base



Niagara Region, Official Plan (2014)

Employment and Jobs

Workforce Participation

As Niagara's working age population continues to increase, the number of residents actively participating in the workforce has changed very little. In 2014, Niagara had a 62% employment participation rate and within four years it currently sits at 61.1%. Perhaps this could be explained by a growth in part-time or precarious job opportunities.

Top Job Sectors

The top job sectors in Niagara have changed over the past 20 years quite significantly. The following table describes the percentage of jobs in the region by employment sector from 1996 to 2016, 20 years later.



209,890

people employed in the labour force



80,000

projected new people employed by 2041

Municipal Comprehensive Review, Phase 4 Forecast (2018)

Job Sector Changes in Niagara

Top 3 in 1996			Top 3 in 2016		
Manufacturing	19.8%		1		29.1% Sales and Service (included retail)
Retail Trade	13.6%		2		14.9% Trades, Transport and Equipment Operators
Health and Social Science	10.0%		3		13.1% Business, Finance and Administrative

Statistics Canada, Niagara Census Profile (1996, 2016)
Note: Industry classification code description for job sectors have changed slightly from 1996 to 2016



Tourism in Niagara


There are many unique traits that Niagara can boast of in the tourism industry, including, Niagara Falls, Shaw Festival, Niagara Wine Route, Casinos. Niagara's tourist attractions, festivals and special events make Niagara an attractive destination for tourists from all over the world.

Tourism in Niagara




13,000,000
VISITORS TO NIAGARA

\$2.4
BILLION
Generated by tourism



33% Of Visitors are from outside of Canada



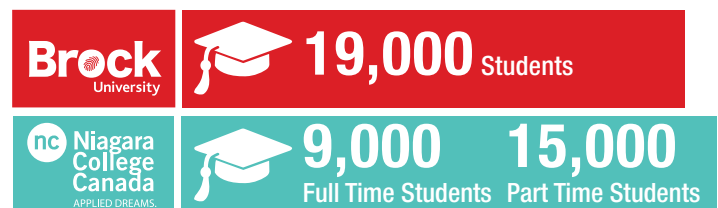
40,000
People work in hospitality and tourism industry

Ontario Ministry of Tourism (2016)

Post-Secondary Institutions

Niagara's post-secondary institutions are key contributors to our local economy and provide opportunity for talent retention and for growth of young professionals in the region. Niagara's post-secondary institutions also provide a significant opportunity for partnerships and strategic alignment with Niagara Region. Brock University and Niagara College have provided opportunities for collaboration in supporting the development of Niagara's labour force, working to support the labour skill gap, economic development and research in Niagara. Continuing partnership opportunities with these institutions and other community organizations in Niagara to leverage their strengths will serve to benefit Niagara as a whole.

Post-Secondary Institution Enrollment

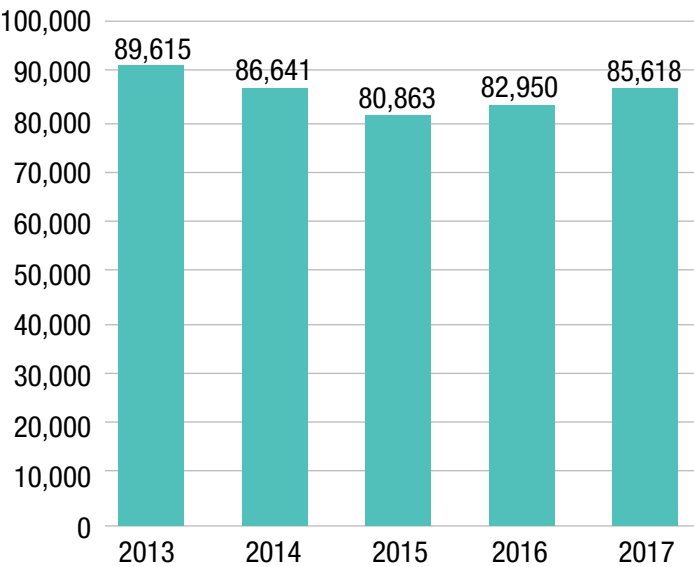


Cost of Living

Household income is a measure of a community's ability to pay for services. While a higher relative household income is a positive indicator of the overall local economy, it may lead to a greater expectation for quality programs and additional challenges in balancing desired levels of service with a willingness to pay for programs and services.

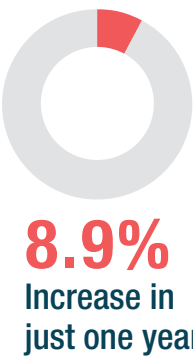
In 2017, Niagara's average household income was reported as \$85,618 (Weighted BMA Study, 2017). Over the course of the last five years, nominal differences were seen. The BMA study also provides an average household income across the province, which can be used as a proxy for an average household income for Ontario. In 2017, the provincial average household income was reported as \$101,143, significantly higher than Niagara.

Average Household Income in Niagara



Municipal Tax Study, BMA Management Consulting Inc. (2013-2017)

Cost of Living



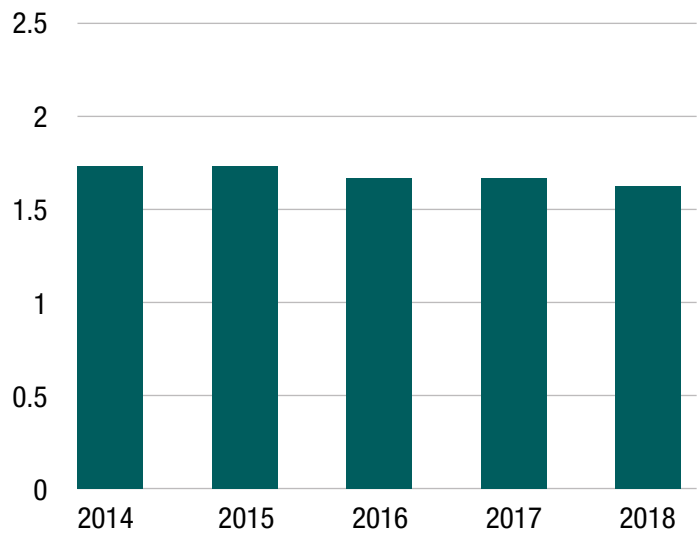
Niagara Poverty Reduction Network (2017)



Niagara's reliance on residential tax base continues to be a consideration for affordability planning. Niagara's employment related tax assessment has not seen any significant change over the last decade. With the anticipated growth outlined in the previous section, Niagara will have to identify sustainable ways of providing services to the residents of Niagara, while meeting the growth needs. The percentage of household income that goes to Niagara Region's residential taxes has changed very little over the last four years. In 2014, the value was 1.74% compared to the 2018 value of 1.64% (Municipal Tax Study, BMA Management Consulting Inc.).

Housing prices continue to increase with an average list price of \$391,030 in 2017. The residential sale price in Niagara has increased by 21.7% in just one year from 2016 (Niagara Realtor News and Statistics, 2017).

Percentage of household income that goes to Niagara Region's residential taxes



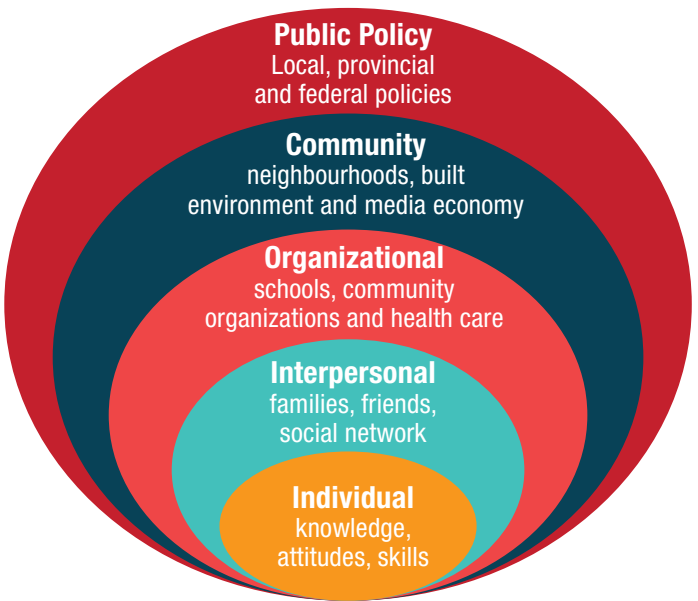
Municipal Tax Study, BMA Management Consulting Inc. (2013-2017)

Community Wellbeing

The term wellbeing is used interchangeably with quality of life, and typically refers to a person's satisfaction with community-level factors such as living environment, economy, education, health, as well as the level of social connectedness and community belonging.

People do not act in isolation, which is why it is important to understand how they interact with their community and the environment around them. One way of visualizing these interactions is through the socio ecological model.

Socio Ecological Model



Social Determinants of Health

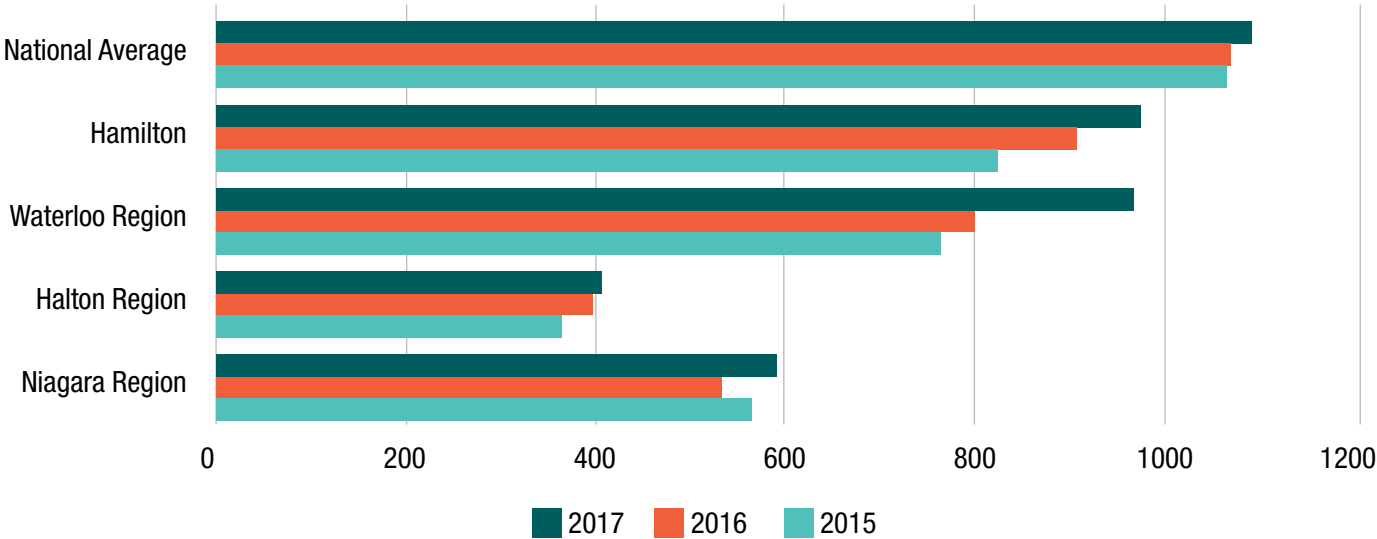
Health is a natural extension of wellbeing, and Social Determinants of Health is a term used to represent a range of personal, social, economic and environmental factors that determine individual and population health. Reducing social inequalities translates to giving everyone the same opportunities to be healthy. The table below provides a summary of how the Region's services may have an impact on our population's health.

Category	Regional Service Description	Impact on Wellbeing
Infrastructure	Transportation (active, public transit, automobile, commercial), roads and bridges, waste management, water, wastewater, buildings	<ul style="list-style-type: none"> • Safe and affordable housing • Water and sanitation • Access to services through safe and maintained transportation infrastructure
Access to Services	Senior services, child and family services, housing and homelessness, transportation and walkability (enabling mobility and access to services) Public health services, bike lanes and pathways, ambulances and emergency services	<ul style="list-style-type: none"> • Equitable access to health programs and services • Healthy child development • Physical and social environment • Social inclusion
Physical Environment	Environmental protection, sustainable development, land use planning policy, urban design, active transportation infrastructure	<ul style="list-style-type: none"> • Access to greenspace • Food security through access to nutritious food, agriculture and food production
Economy	Supports for jobs and skilled labour, investment attraction	<ul style="list-style-type: none"> • Employment and job security • Equitable income distribution • Addressing precarious employment and working conditions
Governance and Advocacy	Proactive leadership, fiscal responsibility, open government, advocacy for Niagara	<ul style="list-style-type: none"> • Ensuring active participation and engagement of communities in decision making • Equitable access to services
Community Wellbeing	Safety, police presence, community planning, walkability, engagement, newcomer supports	<ul style="list-style-type: none"> • Social inclusion • Built environment conducive to physical activity, recreation and walkability for all ages • Sense of belonging promoting social cohesion

Safety

Niagara has a good level of public safety and has been maintaining low violent criminal code incidents in comparison to similar or neighbouring municipalities. A feeling of safety has a positive impact on an individual and community's wellbeing, and it contributes to the attractiveness of a place to live in.

Reported Number of Violent Criminal Code Incidents per 100,000 Population



Canadian Centre for Justice Statistics (2015-2017)





MOVING NIAGARA FORWARD

In order to be successful for the next term of Council, with only four years to make a meaningful impact, the Region needs to effectively identify a plan that is focused and clear in its direction forward.

Vision For Niagara

Typically a strategic planning process begins with a vision setting exercise, and the new Council will be given the opportunity to review the current vision if they so choose. To inform a vision setting process, the community was asked what they hoped Niagara would be known for in 10 years, summarized below. A full overview of what the community said can be found in the *What We've Heard* report.

The community would like Niagara to:

Be a thriving economic hub



Maintain unique traits and natural features



Have a high level of community engagement



Have inclusive services



Be a vibrant community



SWOT Analysis

Through a combination of information collected through community engagement and staff input, the following strengths and weaknesses for Niagara Region have been identified. It is important to note that some are statements of the community and that many of these strengths and weaknesses are not unique to Niagara.



Organizational Strengths

- Ability to leverage global brand recognition: Niagara Falls, Niagara Wine Industry, Welland Canal and all surrounding attractions
- Collaboration with local community organizations, post-secondary institutions
- Partnerships with local area municipalities to better serve residents such as development and customer service
- Economic designations and incentives to drive growth
- Ongoing work to build connective transportation network
- Building organizational maturity around data driven decisions, project management and asset management



Organizational Weaknesses

- Coordination with local area municipalities and Region to bring a singular voice to higher levels of government and customer service
- Ability to handle future increases in service demand. Including, factors such as growth from Greater Toronto Area and aging population.
- Sustainable funding for Regional services such as infrastructure projects and social services
- Widespread densely populated areas, service delivery reach can be challenging
- Customer service including opportunities to increase hours of operation or access to services



External Opportunities

- Geographic location, access to Greater Toronto Area and Buffalo, natural assets and greenspace
- Potential provincial or federal funding opportunities
- Emerging economic sectors, such as sports tourism and cannabis
- Explore broadband opportunities for rural areas
- Opportunities to align services to emerging higher level government priorities. Such as federal requirements for coordinated of services
- Enhance organization's reputation including transparency, trust and accountability



External Threats

- Provincial and federal unknowns in policy and funding
- Workforce pressures such as the inability to retain and recruit skilled workforce
- Lack of succession planning in local businesses
- Dependency on seasonal and precarious employment
- Youth and young family retention
- Increasing housing prices
- Impact of aging population on regional services and economy, however these could present as potential opportunities

Tying the Organization's Initiatives with Community Priorities

Niagara Region has made significant progress in moving towards a better Niagara including momentous progress on the GO transit initiative, on "Bending the Curve" of the Ontario Works caseload, and on the Niagara's Foreign Trade Zone designation, among many others. There is an opportunity to build on this momentum, to set the focus for Niagara's success through this strategic planning process.

This section of the report outlines some Past, Upcoming and Potential Initiatives, (as applicable) of Regional departments, matched to the 17 community priorities from the *What We've Heard* report. As this report serves as an informational document, it will then be up to Regional Council to utilize the relevant components of the Shape Niagara reports, and determine which strategic areas of focus the Region will set. Past initiatives of the Region can be found in the Term in Review report, and can be downloaded at niagararegion.ca/priorities.

Priorities from the community are available in full within the *What We've Heard* report, and are identified in rank ordered by frequency (how often a priority was identified). The report can be found at niagararegion.ca/priorities.



Current Niagara Region Departmental Makeup

At the time of writing this report, the divisional service areas by department are as follows:



Community Services

- Children's Services
- Homelessness Services
- Seniors Services
- Social Assistance and Employment Opportunities



Enterprise Resource Management Services

- Business Licensing
- Finance
- Facilities
- Information Technology
- Internal Control and Organizational Performance
- Legal
- Procurement



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- Clerks
- Economic Development
- Human Resources
- Strategic Communications and Public Affairs



Planning and Development

- Community and Long Range Planning
- Infrastructure and Development Engineering
- Development Approvals



Public Health

- Public Health Services
- Emergency Medical Services (EMS)



Public Works

- GO Implementation Office
- Transportation Services
- Waste Management Services
- Water / Wastewater



Community Services

Services Supporting Niagara's Residents

Aligning to Niagara's Community Priorities:

Niagara's community identified the need to support residents in a way that makes Niagara a place where everyone can thrive. An importance was placed around supporting populations in need by ensuring necessary services are provided including senior services, affordable housing, services for young families and vulnerable populations.

The Region's Community Services initiatives align with the following community-identified priorities:

- | | |
|---|----------------------------------|
| 3. Supporting populations in need through employment, affordable housing and transit..... | What We've Heard Report, page 41 |
| 9. Affordable Housing..... | What We've Heard Report, page 43 |
| 10. Quality of Life and Public Safety | What We've Heard Report, page 43 |
| 11. Equitable Access to Regional Services | What We've Heard Report, page 43 |
| 15. Youth and Young Family Retention..... | What We've Heard Report, page 45 |

Past Organizational Initiative

"Bend the Curve" on the Ontario Works Caseload

Goal was to increase the number of Ontario Works and Ontario Disability Support Program clients with employment. The BENN (Building Employment Networks Niagara) system launched in November of 2017. The shift from a manual tracking to system automation has resulted in an increase in the quantity of referrals and efficiency (real-time) of matches to training programs and employment opportunities. The long term goal is to further reduce the Ontario Works caseload.

Upcoming Organizational Initiatives

Long Term Care Home Redevelopment Projects

The redevelopment of two Long Term Care (LTC) homes has been undertaken to meet provincial compliance and fire code requirements. The new homes will be designed to enhance efficiencies and will be situated on campuses with co-located services to support long-term care residents and the local community.

Affordable Housing

To fulfill Niagara Region's provincially legislated responsibility, staff are preparing an updated 10-year Housing and Homelessness Action Plan (HHAP) to be presented to Council for approval in the spring of 2019. The revised HHAP will be integrated with the work on the new Regional Official Plan now in development, further contributing to an overarching regional Affordable Housing Strategy. This strategy will include a Regional Housing Statement, a review of and recommendations for Regional policies and financial incentives with the aim of increasing the availability of affordable housing in Niagara.



Early ON Transformation

In 2016, the Ministry of Education announced all Family Resource Programs, Ontario Early Years Centres, and Parenting and Family Literacy Centres move toward an increasingly integrated, cohesive system of services and supports for children ages 0-6 years and their parents/caregivers known as EarlyON Child and Family Centres (EarlyON Centres). The EarlyON Centres are open to all families across Niagara region, to provide support, advice, personal connections and a network of resources as well as play and inquiry based programs for young children and their families.

Niagara Region Children's Services, in the role of Consolidated Municipal Service Manager (CMSM), is required by the Province to engage with community and implement this transformation locally as part of their responsibility for the planning and administration of the early learning and child care system. The 2018 year was a transition year, and the new EarlyON programs, locations and services informed through local consultation and needs assessment, will be awarded through a competitive bidding process in 2019.

Potential Organizational Initiatives

Social Procurement – An Organizational Opportunity

Seeking a community benefit through the purchase of goods and services can have a strategic benefit to objectives such as reduction of poverty, increasing employment for youth, or inclusion/engagement of marginalized populations, without requiring additional investment. Social procurement processes have already been developed that meet procurement requirements of transparency, competitiveness and fairness, while still allowing for a social benefit. Many municipalities across Ontario are implementing this approach as part of their poverty reduction initiatives.

Potential Opportunities

- Improvements in service delivery to provide higher value to clients, for example, BENN
- Potential opportunity to address affordable housing gap through strategy alignment and co-investment with Provincial and Federal government housing initiatives
- Opportunities to align services/work/projects with new provincial government as priorities are identified

Potential Obstacles

- Provincial uncertainty around funding and policy changes. Effects could be to core services, such as social assistance, childcare, homelessness/housing and senior's care
- Historical challenges with funding allocation model for homelessness services as Niagara enters into new contracts for this sector



Enterprise Resource Management Services (ERMS)

Corporate Services Supporting the Organization

Aligning to Niagara's Community Priorities:

Community members identified a desire to stay informed about where their tax dollars are spent through transparency in government spending, and decision-making.

Fostering “organizational excellence” is a generic term, which encapsulates the goal of improving the way the Niagara Region as an organization functions. The focus of the community comments received identified a desire to build on collaboration, customer service and opportunities to foster informed decisions as an organization.

The Region's ERMS initiatives align with the following community priorities around accountability and organizational excellence:

8. Infrastructure in Support of Growth.....	What We've Heard Report, page 42
11. Equitable Access to Regional Services	What We've Heard Report, page 43
14. Communication and Engagement with the Community.....	What We've Heard Report, page 44
16. Responsible Spending.....	What We've Heard Report, page 45

Past Organizational Initiative

Enhanced Financial Management Service

The implementation of an integrated enterprise solution to provide system functionality that improves efficiency and effectiveness, reduces risk, enables effective internal controls, ensures better management of the organization, and improves the client experience.

Value for Money Audits

Determining if Regional programs, including the execution of policies and procedures, are delivered in an efficient, effective and economical manner. Over 13 recommendations were compiled to address corporate project management methodology, asset management, cost estimation, document management, performance measurement and other issues.

Southwestern Integrated Fibre Technology (SWIFT)

Looking to secure federal and provincial funding to improve Niagara's information infrastructure and to provide better connections for residents and businesses in rural communities. Through the project, Niagara is now a key partner in a larger buying group to attract broadband providers.

Upcoming Organizational Initiatives

Asset Management

Addressing provincial requirements, an Asset Management (AM) program and governance model was developed implement leading AM principles and practices. Next steps include an implementation plan which will assess the impacts on the organization, and address change management, communications and training plans. The AM governance model will ensure that the Region complies with the requirements set out by the Province.

Project Management Office

Deliver and assess the organization's project management maturity. Strengthen the link between capital project planning and execution so that the project outcomes are predictable, and consistent, with risk management considerations. Recommend proven practices to support implementation of organizational strategy through successful projects including organizational change and business readiness assessment and preparation.

Debt and Financial Sustainability Review

In support of responsible spending, the Region is looking strategically at what it spends money on. To answer the question of whether there are there more cost effective ways of doing our business, a review of the services provided and the associated costs will be conducted. The intended outcome of this project is to repurpose dollars to support the significant infrastructure budget gap.

Regional Development Charges (RDC) By-Law

The next RDC By-law is an opportunity to re-align incentives for development, to Council's strategic focus, and to be viewed as the revenue-generation tool it is intended to be, supporting responsible government spending with purpose. It ties directly into the grants and incentives review that is being led by the Planning and Development department to re-align grants and incentives provided by the Region with Council's strategic focus.

Debt Risk Strategy

The finance team has been tasked with working on debt and a long term strategy in how it is handled at the Region. How the Region finances all assets cannot change each year, a set plan must be in place in order to manage and plan against it. This will include the development of debt policies and a risk management strategy.

Safe Drinking Water Act

The Safe Water Drinking act requires municipalities to prepare financial plans in the sustainability of water and waste water systems. Finance staff will be working with Public Works to build a plan that focuses on building a strategic plan for the Region to address funding of major infrastructure of wastewater over the next 10 years. This long range financial planning will be integrated with the master servicing plan and has opportunities to connect to the sustainability review and revenue generation.



Internal Audit

Reporting directly to Council and designed to drive accountability, identifying opportunities for improvement across organization, the Internal Control and Organizational Performance division prepares an annual Audit Plan, providing independent assurance and consulting services to improve Niagara Region's operations and brings a disciplined approach to the evaluation of risk management activities, internal controls, and governance processes.

Supporting Council's Strategic Planning and Reporting

Supporting Council in the development, implementation and monitoring of their term Strategic Plan through the Shape Niagara work. Re-alignment of the public facing dashboard and progress reporting with Council's new strategic priorities to ensure accountability and transparency on the work of the Region.

Business Improvement and Performance Measurement

Driving continuous improvement through business improvement and lean methodology, performance measures and operational dashboards. Leveraging data to inform business decisions focusing on measurable outcomes to drive organizational accountability and transparency.

Customer Service Implementation

The Customer Service team is working with the organization to leverage information and communication technology to modernize how government delivers services and interacts with clients and residents. The initiative requires collaboration across government levels and partners to integrate and enhance opportunities across the region as a whole.

Enterprise Content Management

This initiative looks to address gaps in our records management activities and policies to ensure the organization has the documentation it requires and to support transparency.

IT Data Centre

Through collaboration with multiple public sector partners (such as: LAMs, school boards), there are opportunities to share data and costs associated with storing data as well as increased security measures.

Facilities

Led by Facilities and supported by Finance staff, finding sustainable ways of funding new construction projects while ensuring infrastructure is aligned with growth and development needs in Niagara. Upcoming projects include the Police One District in St Catharines, Long-Term Care facilities, EMS hub, Niagara Regional Civic Park.



Potential Future Organizational Initiatives

Council Strategic and Implementation Plan

The Internal Control and Organizational Performance (ICOP) division will work directly with Council as they identify their strategic priorities. Informed by the Shape Niagara work, and by their collective knowledge, Council will identify the organizational priorities for the next four years.

SWIFT Broadband Internet

Niagara Region secured the opportunity to participate in the Southwestern Integrated Fibre Technology (SWIFT) program to bring high speed internet to underserved communities in Southwestern Ontario. The opportunity is to support the growth of small businesses in rural areas by expanding access to online and e-commerce tools. These federal and provincial programs are currently under review.

Potential Opportunities

- Integration of partnerships: working with Province for additional funds beyond short term financial plans
- Funding of the service enhancement and integration of Niagara Regional Transit; integrate with local municipalities and advocate for funding to expand transit
- Potential for provincial and federal funding for South Niagara water and wastewater treatment plant
- Customer service modernization
- Explore Niagara Regional Broadband Network partnership
- Driving continuous improvement and organizational maturity, using data for decision making

Potential Obstacles

- Provincial interest in municipal restructuring (amalgamation) – would be a large financial project
- Regional budget pressures
- Unknowns at provincial level
- Continued growth in the region
- Cost and availability of infrastructure for broadband expansion





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Economic Development

Aligning to Niagara's Community Priorities:

Through the *What We've Heard* report, community members identified the need to develop Niagara's economy based on its strengths. The community would like to see a focus on supporting small business, secure employment opportunities and ensuring the necessary supports are in place to foster economic prosperity.

The Region's initiatives in Economic Development align with the following community-identified priorities:

- | | |
|---|----------------------------------|
| 1. Fostering Jobs and Economic Prosperity | What We've Heard Report, page 40 |
| 5. Accountable and Collaborative Government | What We've Heard Report, page 41 |
| 13. Tourism as an Economic Driver | What We've Heard Report, page 44 |
| 15. Youth and Young Family Retention..... | What We've Heard Report, page 45 |

Past Organizational Initiatives

Federal Commitment to Foreign Trade Zone in Niagara

Raising global and national business awareness, supporting export-focused business operations; Niagara's Foreign Trade Zone storefront opened in Fort Erie in May of 2018.

Strategy to Improve Niagara's Global Attractiveness

A Global Attractiveness Strategy has been created that provides direction to increase Niagara's readiness for being a welcoming community. Key outcomes include strengthened relationships between Regional staff and the Local Immigration Partnership, the re-development of Niagara's Immigration Portal and improved access to local information.

Upcoming Organizational Initiatives

Economic Development Strategy

Following research and extensive stakeholder consultations, a number of key themes have been identified to inform the economic development work plan. The new Economic Development Strategy will be presented to Regional Council early in 2019.

Team Niagara

The Team Niagara memorandum of understanding is currently being revised to update the signatories. This initiative is a collaborative effort bringing together representatives from all 12 local area municipalities and the Region quarterly to network and collaborate on economic development initiatives across Niagara.

Employment Land Strategy

Planning and Economic Development staff working on an Employment Land Strategy and Lands Needs Assessment, as part of the Official Plan work, to protect Niagara's employment lands. In addition, there are efforts underway with the St. Lawrence Seaway and Hamilton Port Authority to investigate land acquisition as part of a Niagara Port Strategy.

Skilled Labour Shortage

The Economic Development department is collaborating with organizations such as Niagara Workforce Planning Board, Niagara Industrial Association, Niagara's post-secondary institutions and School Boards to tackle the mismatch between labour skills and jobs across the Region.

East-West Transportation Corridor

Economic Development will support Public Works to develop an application to secure infrastructure funding from Transport Canada's National Trade Corridors Fund. The funding would construct a portion of the East-West Transportation Corridor, which would run roughly from Fort Erie to Hamilton Airport in support of goods movement. It would tackle the congestion issue on the Queen Elizabeth Way (QEW) which is a significant risk for the tourism, agriculture and manufacturing sectors in Niagara.

St. Lawrence Seaway Management Review

Elected officials have presented a joint submission with five Niagara area municipalities along the Seaway corridor to the federal government regarding a consultative review of the St. Lawrence Seaway conducted by Transport Canada in 2018. The recommendation to Transport Canada is a new management model for marine-strategic lands and an analysis of non-strategic land. Niagara has recommended that Transport Canada, with support from the Ontario Ministry of Transportation, consider a partnership with the Hamilton Port Authority with respect to the management of marine-adjacent strategic parcels of the St. Lawrence Seaway through Niagara.

Strategic Marketing

Conducting targeted marketing activities to position Niagara as a competitive location for business investment.

Trade and Investment

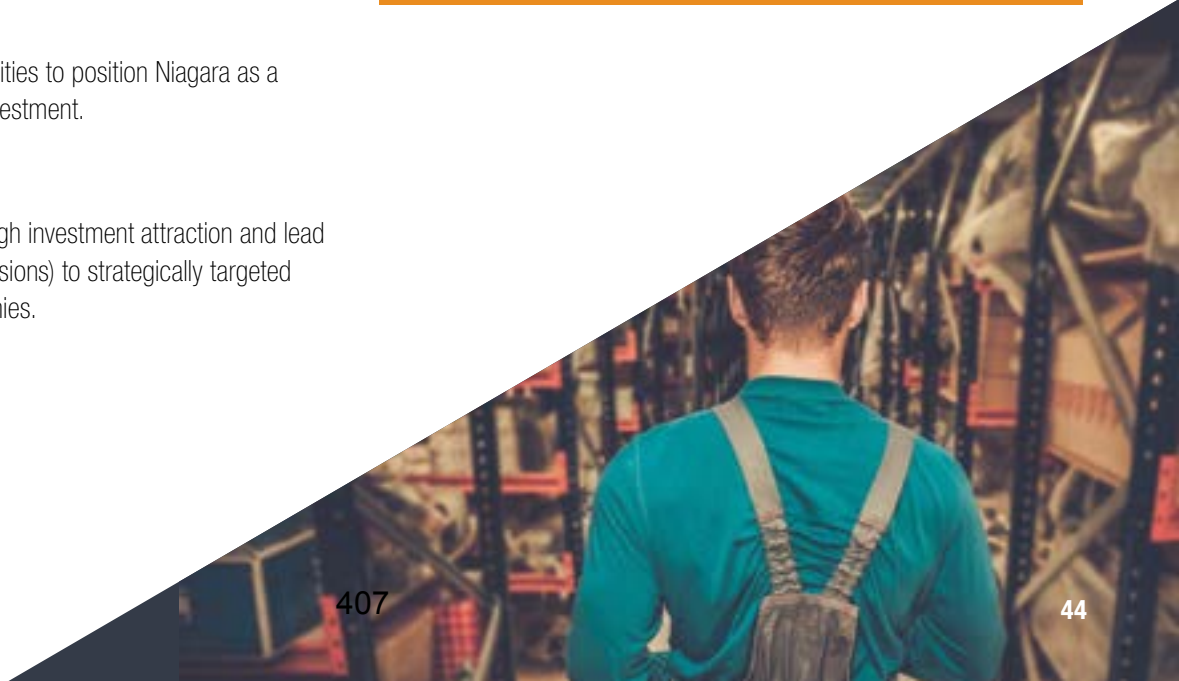
Promoting the Niagara Region through investment attraction and lead generation activities (investment missions) to strategically targeted sectors and within specific geographies.

Potential Opportunities

- Increased market interest and growth coming from the Greater Toronto Area
- Economic Trade Corridor designation award which would support infrastructure-funding applications and create unique marketing opportunities
- Niagara Foreign Trade Zone role in export diversification for Niagara companies
- Creation of a provincially significant employment zone with the Niagara Gateway Economic Zone and Centre

Potential Obstacles

- Meeting current and future labour needs for skilled trades and professional occupations
- Shortage of employment land that is shovel-ready and development pressures on land zoned for employment
- Infrastructure pressures, for example, congestion on the QEW
- Scheduling of public transit needs to align with employment needs
- Lack of succession planning in Niagara businesses





Office of the CAO

Clerks | Human Resources | Strategic Communications and Public Affairs

Aligning to Niagara's Community Priorities:

Niagara's community identified a need to be informed and have their voices heard through increased transparency in government spending and decision-making.

The Region's CAO Office initiatives align with the following community priorities around communication, accountability, organizational excellence and transparency:

- 2. Transportation Connecting People to Jobs and Services..... What We've Heard Report, page 40
- 5. Accountable and Collaborative Government..... What We've Heard Report, page 41
- 14. Communication and engagement with the community..... What We've Heard Report, page 44

Past Organizational Initiative

People Strategy

The people strategy focused on delivering an interrelated, measured approach to driving employee engagement. Through development and retention and by utilizing best in class people practices at the Niagara Region.

Niagara Week is Every Week

Focusing on fostering strong relationships between the Region and its senior government partners, collaboration with Niagara's local area municipalities to advance Niagara's economic prosperity. Key announcements through this initiative included the Daily GO Train Service, the first Ontario Foreign Trade Zone designation, 2021 Canada Summer Games.

Upcoming Organizational Initiatives

Special Projects

Niagara District Airport

Based on the work of an external consultant, there is an on-going requirement for an airport located within the region to serve the business and general aviation needs of residents and visitors within Niagara. Aligning with the Region's Transportation Strategy, an airport study and governance strategy is underway. These studies will focus on the governance and funding opportunities for each the Niagara District Airport (NDA) and Niagara Central Dorothy Rungeling Airport (NCDRA). There has also been support for a potential Regional role in the operation of the airport(s) to support the larger scale connected transportation strategies of the Region around moving people and goods.

2021 Summer Games

Niagara Region has been selected as the Host Community for the 2021 Canada Summer Games. The prior term of Council committed \$10.35M in funding to support infrastructure projects related to hosting the Games. Each community in Niagara will host events or practice events in 2021. The Games are administered by the 2021 Canada Summer Games Host Society, and Regional staff will support as required.

Potential Organizational Initiatives

Communications Master Plan

The Strategic Communications and Public Affairs division will be undertaking the development of a Communications Master Plan (CMP) which will set out a defined mission and vision as well as identify objectives, key actions and a framework for the organization. The CMP will bring together resident feedback and best practice research with input from staff and Council to act as a framework to provide guidance to how Niagara Region will communicate and interact with residents, employees and stakeholders.

Human Resources Information Systems (HRIS) Software Review

Niagara Region's largest and most important expense is its people. A review of current software will be initiated to ensure the technical tools being used to manage this expense are providing value, are fully leveraged, and will help drive engagement and productivity into the future.

Employee Engagement and Leadership Development through People Strategy Update

Driving productivity, employee commitment and attraction through a new People Strategy for 2019 and the coming years.

Mental Health Promotion Strategy and Implementation

Managing workplace factors for employee well-being, the emerging regulatory requirements and the urgency of escalating related costs.

Total Rewards and Labour Relations Strategies

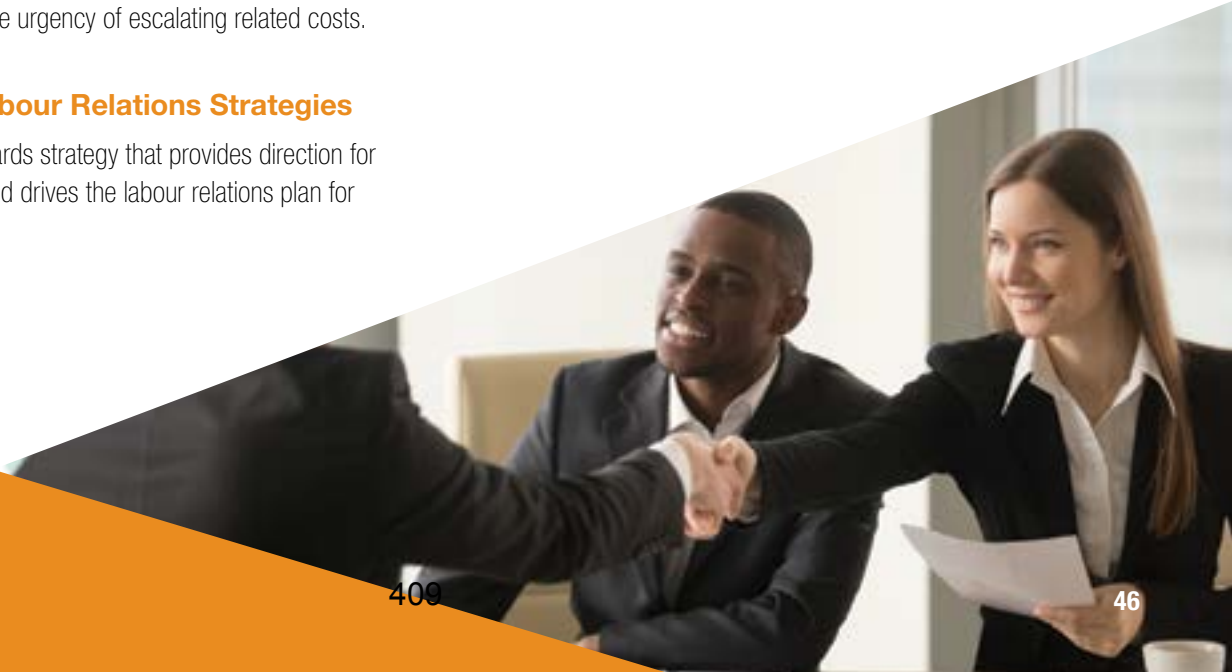
Building a comprehensive rewards strategy that provides direction for compensation and benefits, and drives the labour relations plan for future bargaining.

Potential Opportunities

- Improve organizations reputation
- Improve relationships with local media and more consistent transparent communication with residents

Potential Obstacles

- Regional budget pressures
- Local shortage of skilled labour and workforce talent
- Changing municipal act legislation requirements. Including conflict of interest, integrity commissioner





Planning and Development Services

How Niagara Grows

Aligning to Niagara's Community Priorities:

Niagara's community would like to see sustainable and thoughtful growth that is aligned with diverse community needs and transparency in spending. The community also identified the importance of protecting and maintaining a resilient natural environment, as well as protecting the rural character of the Region, key natural assets and agricultural land.

The Region's Planning and Development Services initiatives align with the following priorities around growth, sustainable development and environmental protection:

- 4. Environmental Responsibility and Sustainable Development.....What We've Heard Report, page 41
- 5. Accountable and Collaborative Government What We've Heard Report, page 41
- 7. Preserving Niagara's Natural Assets What We've Heard Report, page 42
- 16. Responsible Spending..... What We've Heard Report, page 45

Past Organizational Initiative

Expedited Process for Development

An expedited planning approvals process was developed to increase approval certainty and accelerate the review period for development initiatives. The project created an evidenced-based evaluation procedure to evaluate sites and created the ability to showcase "shovel-ready" sites as part of Niagara's competitive advantage in attracting new investment.

Upcoming Organizational Initiatives

Official Plan

Growth Management including a housing strategy, employment land strategy, urban structure and land needs assessment.

Natural Systems including agriculture, natural heritage system, aggregates and climate change.

Employment Land Strategy

Planning and Economic Development will be working on an Employment Land Strategy, as part of the Official Plan work to identify strategies to protect Niagara's employment lands. As part of this, there are efforts underway with the St. Lawrence Seaway and Hamilton Port Authority to investigate land acquisition as part of a Niagara Port Strategy.

Grants and Incentives Programs

A review of the Regional grants and incentives programs will be conducted to address misalignment in the grants and incentives provided by the Region with Council's strategic focus. Additionally, having more streamlined offerings will reduce confusion, reduce red tape and improve administration. By working closely with stakeholders, the Region can ensure that grants and incentives are directed to where incentives provide the best return on investment, while ensuring transparency in spending.

Memorandum of Understanding with Developers

Currently our Planning and Development department meets regularly in collaboration with local area municipal staff with developers at pre-consultation meetings. These meetings are designed to eliminate red tape by ensure the correct documentation and requirements are submitted upfront with a development application. This process has worked well in the past, and there is an opportunity to review what has been learned from holding these meetings to update, improve service and further build relationships.

Environmental Planning

With the addition of a new environmental planning team within the Planning and Development department, there is a greater ability to balance Niagara's drive to be open for business with good environmental policies and planning.

Urban Design

Ensuring development projects include functional and attractive urban areas creates a sense of place within the community. The Niagara Regional Civic Park is an example of the core principles of urban design to improve the public environment. The project provides the Region the ability to lead by example, particularly if developers are expected to incorporate urban design into their own projects.

Potential Opportunities

- Work with local municipalities to identify growth nodes that will accommodate future population growth
- Work with local municipalities to increase housing supply to meet future housing and affordable housing targets
- Build on the strength of the agriculture sector through supportive land use policies, including on-farm diversified use
- Develop new natural systems, policies, and mapping that are reflective of the needs and priorities in Niagara, which better implement Provincial direction, while reducing uncertainty in the development process
- Establish a relevant critical mass of employment land that will meet the requirements business and establish Niagara's position within the regional Greater Golden Horseshoe market and builds on access to the US market
- Incorporate climate change throughout urban and rural land use policies

Potential Obstacles

- Population forecasts evolve over time and are assumed by some to be static
- Urban planning regulations and policies are limited in their ability to resolve challenges that are not land use based, for example affordable housing



Public Health and Emergency Medical Services

Building a Healthier Niagara

Aligning to Niagara's Community Priorities:

Niagara's community spoke of the value of fostering a feeling of safety, community inclusiveness and equitable access to health services, which aligns with the department's movement towards greater focus on health equity and the social determinants of health.

The Region's Public Health initiatives align with the following priorities around quality of life, and access to health care services:

10. Quality of Life and Public Safety	What We've Heard Report, page 43
15. Youth and Young Family Retention.....	What We've Heard Report, page 45
17. Mental Health Services	What We've Heard Report, page 45

Past Organizational Initiative

Top Ten Health Issues in Niagara

Public Health has identified the top ten overall Niagara-specific health issues for each of 11 different age groups across the life course for both males and females. These top ten health issues in Niagara are the basis for decisions around services and programs, leading towards an outcome-focused service delivery model.

Upcoming Organizational Initiatives

Top Ten Health Issues in Niagara

Public Health has identified the top ten overall Niagara-specific health issues for each of 11 different age groups across the life course for both males and females. These top ten health issues in Niagara are the basis for decisions around services and programs, leading towards an outcome-focused service delivery model.

Health Equity Strategic Plan

Health Equity is defined as "all people having the opportunity to achieve their full health potential and being free from social, economic, demographic, or geographic barriers to health". The strategic plan (2018-2022) operationalizes this concept within the scope of our local public health agency to maximize the community's opportunities for health and wellbeing.



Mental Health Promotion Strategy (MHP)

Mental health, as part of Niagara's Top Ten was identified as one of the top burdens of disease in Niagara. The goal of the MHP strategy is to build mental health literacy and reduce stigma, ensuring that MHP is embedded into all initiatives within Public Health by making "every contact count".

Parenting Strategy

A framework to guide decision-making about how we support and engage with parents and families in Niagara. By using a Social Determinants of Health lens, this strategy is aligned with the Health Equity Strategic Plan and Mental Health Promotion Strategy to support populations in need. The strategy will equip parents in Niagara with the knowledge, skills, and resources necessary for their children and family to thrive, and ultimately make Niagara the best place to raise a family.

Potential Organizational Initiatives

Emergency Medical Services (EMS) Transformation

EMS call volume has been steadily increasing over the last few years and is projected to continue according to this trend. Paired with hospital offload delay issues, this has prompted a review of how ambulances and paramedics are dispatched. EMS is identifying new ways of doing business to better handle this volume by providing tailored care to make services available, accessible and affordable. EMS transformation is in progress as a pilot and has dedicated resources around project coordination. A complimentary restructuring of the physical footprint of ambulance bases, the hub model has been deferred to 2020.

Potential Opportunities

- A corporate and public health movement towards outcome focus with supporting data and dashboards, utilizing business intelligence software
- Transforming the way Niagara Emergency Services (EMS) deliver service, through the EMS transformation and hub projects
- Customer service changes to bring multi-modal opportunities for clients to access services
- Connective transportation to connect people to needed services

Potential Obstacles

- Potential provincial funding and policy changes with the new Provincial government
- Emerging issues in health, for example, opioid crisis, and legalization of cannabis
- Climate change impacts on environment and health status in Niagara
- Provincial government plans to restructure the health sector, and review Regional governments





Public Works

Transportation

Aligning to Niagara's Community Priorities:

Niagara's community identified the need to continue on the path towards interconnected systems for mobility. The importance of a connected transportation network for Niagara is that it connects people to necessary services such as health care, employment, and social services. The improvement of connective corridors to mitigate increasing levels of traffic and support upcoming growth was also identified.

The Region's Public Works initiatives align with the following priorities around connective transportation:

- 2. Transportation Connecting People to Jobs and Services What We've Heard Report, page 40
- 6. Active Transportation What We've Heard Report, page 42
- 8. Infrastructure and Growth What We've Heard Report, page 42

Past Organizational Initiative

Hub and Transit Station Study

Planning for transit-supportive development around Niagara's GO station sites in Grimsby, St. Catharines, and Niagara Falls; as well as the future Beamsville site. Outcomes of the project included a comprehensive 20-year vision for the surrounding lands, streetscape and public realm elements, and improved connections between GO stations, active transportation networks and municipal transit systems.

Upcoming Organizational Initiatives

GO Train Service

The GO Implementation Office has been working on the acceleration of daily GO Rail Service, in advance of 2021 - 2023 timelines to align with Canada Summer Games. Work is underway around getting stations constructed and online, and determining Region's role in station ownership and ongoing operation.

Inter Municipal Transit

Transit routes have been expanded to mirror local area municipal level. Fleet acquisition and replacement is underway and a governance model for conventional transit and specialized transit will be developed to support this significant community initiative.



East-West Transportation Corridor

A corridor from Fort Erie to Hamilton Airport in support of goods movement, and tackling the congestion issue on the QEW, which is a significant risk for the tourism, agriculture and manufacturing sectors in Niagara.

Active Transportation

The Region's Transportation Master Plan focuses on the creation of a safe, connective network of active transportation facilities that is accessible to visitors and residents of all ages and abilities. Moreover, including infrastructure for active modes of travel that is designed, developed and maintained is necessary to ensure active transportation is a competitive option within Niagara. Work is also underway in Public Health through the Students on the Move project, looking at how post-secondary students in Niagara utilize active transportation to get to school, work, social activities and necessities.

Potential Opportunities

- Transit to increase mobility supporting access to senior care, post secondary schools, tourist destinations and access to jobs and services
- Development Charge by-law update to include transit, as an additional funding source
- East-West Transportation Corridor to relieve traffic congestion, truck traffic on local roads and Greater Toronto Area pressures

Potential Obstacles

- Consolidated Niagara Transit System – significant net new financial consideration
- Provincial and federal funding and policy unknowns
- Active transportation changes to product, increase maintenance costs
- Health care centre of excellence model puts strain on specialized transit budget





Public Works

Infrastructure and Service Delivery

Aligning to Niagara's Community Priorities:

Niagara's community identified the importance of infrastructure as it supports growth and development, ensuring adequate maintenance for safety and the need to incorporate new technologies and quality products to ensure long lasting infrastructure. The community also identified the need to protect the environment through efficiencies in these areas such as new technologies in recycling and water conservation.

The Region's Public Works initiatives align with the following priorities around infrastructure services:

- 8. Infrastructure in Support of Growth What We've Heard Report, page 42
- 12. Water and Waste Management What We've Heard Report, page 44

Past Organizational Initiative

Transportation Master Plan

The Transportation Master Plan (TMP) will provide Niagara with a strategic transportation vision for the next 25 years to enhance quality of life through pedestrian and cycling facilities, responsive and conventional transit and the creation of an integrated network of roads and highways.

Upcoming Organizational Initiatives

Water/Wastewater (W/WW) Master Servicing Plan Implementation

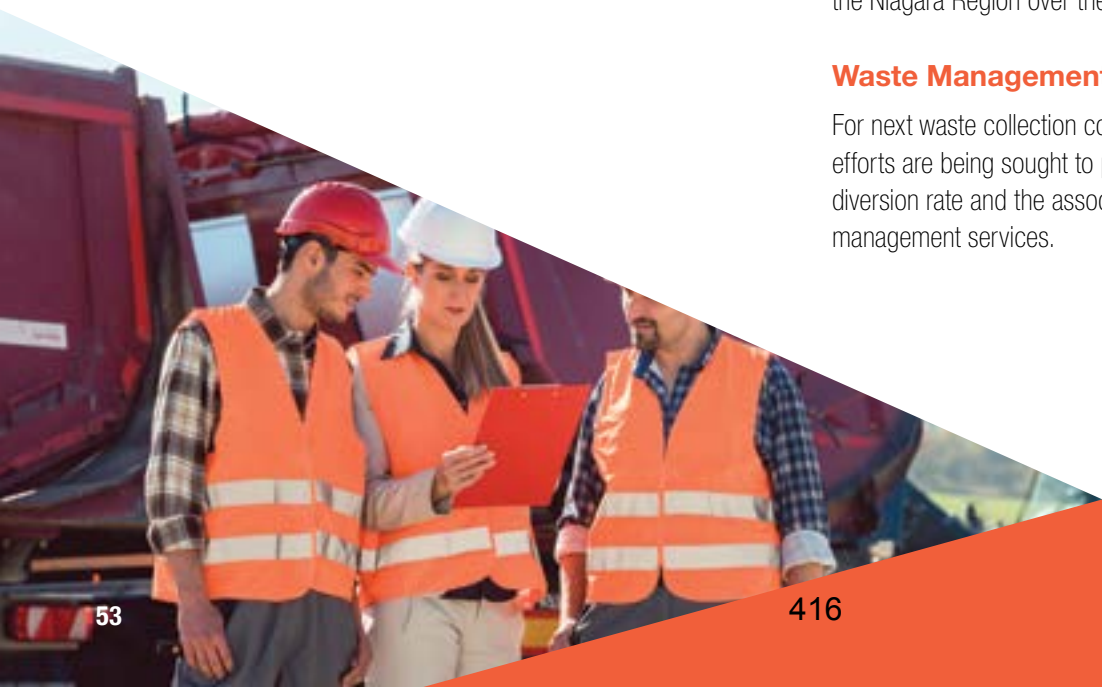
Implementation of the servicing plan over the next 10 year forecast will be a priority going forward with a significant increase in capital investment required for critical infrastructure in support of growth.

Waste Management Strategy

Over the next 25 year period, a strategy is required to ensure sustainable waste management systems and services are available for the Niagara Region over the long term.

Waste Management Service Level Review

For next waste collection contract, efficiencies and sustainability efforts are being sought to positively influence Niagara's overall waste diversion rate and the associated costs required to deliver waste management services.



Transportation Services, Master Plan Implementation

Implement strategic investments in all modes of transportation to support growth and create a balance of community expectations for active transportation and complete streets such as capacity improvement, East-West Transportation Corridor, escarpment crossing.

W/WW Financial Sustainability and Asset Management

Meeting legislative requirements (Safe Drinking Water Act) to implement and demonstrate a rigorous asset management program in the sustainability of W/WW systems. Tying in with asset management efforts, doing the right work, on the right asset, at the right time, for the right cost while minimizing risk.

Enhancement of Management Cycle of Pavements

Improving how the cycle of pavement maintenance is managed, including crack sealing, patching and resurfacing.

Leveraging New Technologies in W/WW

In an effort to improve service delivery, W/WW will leverage new technologies to pursue Automated Systems, Advanced Reporting Systems, event-based preventative maintenance, GIS improvements, workforce mobilization.

GO Train-Enabling of Capital Investments

Ambitious and aggressive project plans for key transportation projects adjacent and supportive of GO station locations. Upcoming or potential projects include Casablanca Blvd, St. Paul W Canadian National Railway Bridge, Louth Street / Ridley Road, Thorold Stone Rd Extension, and Bridge Street.

New Waste Collections Contract

To be developed with input through a service level review. Includes a social marketing and outreach campaign to support implementation of new service.

Potential Opportunities

- East-West Transportation Corridor to relieve traffic congestion
- Innovations in service and funding opportunities
- Material recycling opportunities for road construction
- Potential for smaller funding opportunities through Federation of Canadian Municipalities (FCM) for capital projects

Potential Obstacles

- Cap and Trade and Provincial Gas Tax, leading to higher energy costs, funding impacts
- Increasing construction costs (trade tariffs)
- Climate change impacts (more severe or wet weather)
- Provincial legislation and regulation, for example, divertible material service standards, Ministry of Environment, Conservation and Parks surplus soil policies, MPAC restrictions on data use
- Provincial and federal policy changes
- Funding uncertainty from all government levels (provincial, federal, regional, local)





Summary

Armed with the information from the two Shape Niagara reports, Regional Council will work through the process of developing their 2019-2022 strategic plan in the first quarter of 2019, and a resulting implementation plan. The implementation plan will provide detailed direction for the organization over the next four years, and will focus on the actions required to make Council's commitments a reality. Expected timing is to have the implementation plan identified by the second quarter of 2019 to meet the 2020 budget planning process.

Where We Go Next

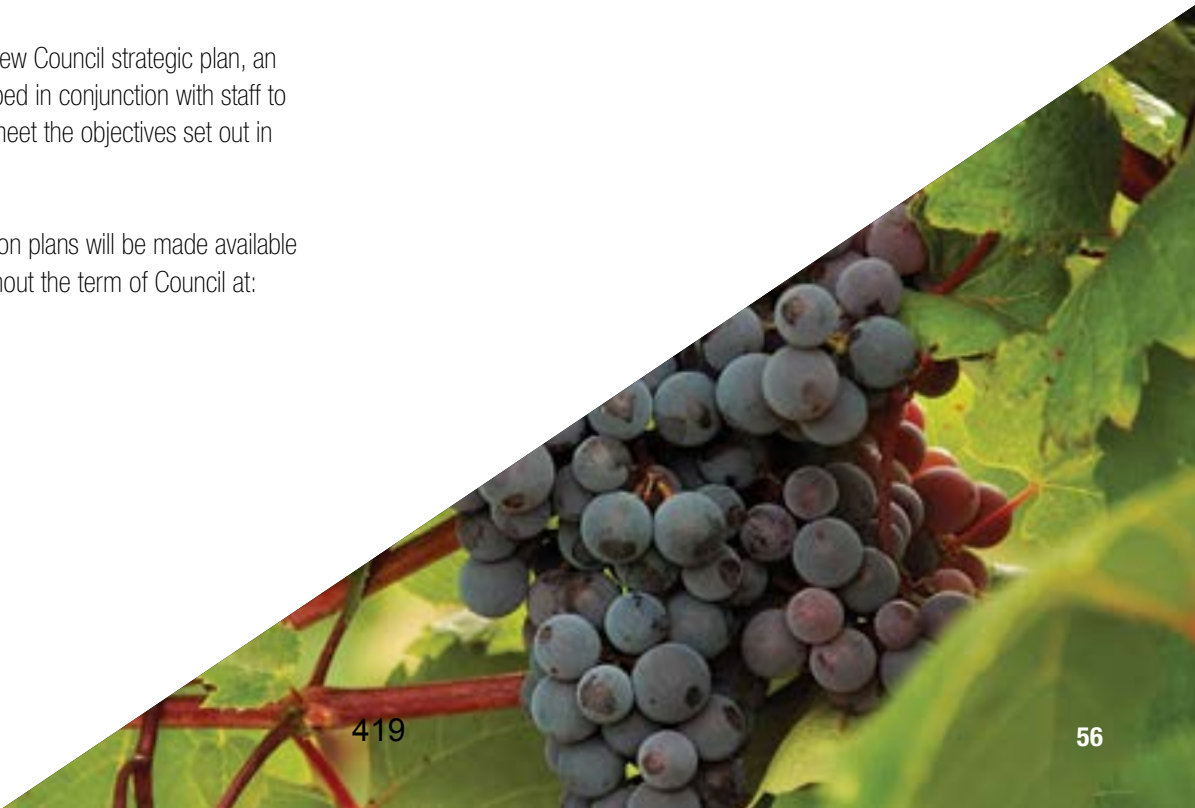


Next Steps

Staff will work with Council to develop their strategic plan, and will utilize a variety of tools and techniques including workshops. Once Council has determined their strategic objectives, a project-based implementation plan is recommended for development to drive actionable outcomes for the four year term. Following these priority setting exercises, staff will refresh the public facing corporate dashboard with updated relevant metrics that align with the strategic direction of Council. Over the course of the next four years, staff will provide ongoing progress reports on the progress of the implementation plan in support of public transparency and accountability.

Following the development of the new Council strategic plan, an implementation plan will be developed in conjunction with staff to determine the course of action to meet the objectives set out in the strategy.

Finalized strategy and implementation plans will be made available along with progress reports throughout the term of Council at: niagararegion.ca/priorities



“

However beautiful the strategy, you should occasionally look at the results

”

— Sir Winston Churchill

SWOT Analysis

Current Niagara Region Departmental Makeup

At the time of writing this report, the divisional service areas by department are as follows:



Community Services

- Children's Services
- Homelessness Services
- Seniors Services
- Social Assistance and Employment Opportunities



Enterprise Resource Management Services

- Business Licensing
- Finance
- Facilities
- Information Technology
- Internal Control and Organizational Performance
- Legal
- Procurement



Office of the CAO

- Clerks
- Economic Development
- Human Resources
- Strategic Communications and Public Affairs



Planning and Development

- Community and Long Range Planning
- Infrastructure and Development Engineering
- Development Approvals



Public Health

- Public Health Services
- Emergency Medical Services (EMS)



Public Works

- GO Implementation Office
- Transportation Services
- Waste Management Services
- Water / Wastewater

Niagara Region Departmental SWOT

Organization Wide



Organizational Strengths

- Ability to leverage global brand recognition: Niagara Falls, Niagara Wine Industry, Welland Canal and all surrounding attractions
- Collaboration with local community organizations, post-secondary institutions
- Partnerships with local area municipalities to better serve residents such as development and customer service
- Economic designations and incentives to drive growth
- Ongoing work to build connective transportation network
- Building organizational maturity around data driven decisions, project management and asset management



Organizational Weaknesses

- Coordination with local area municipalities and Region to bring a singular voice to higher levels of government and customer service
- Ability to handle future increases in service demand. Including, factors such as growth from Greater Toronto Area and aging population.
- Sustainable funding for Regional services such as infrastructure projects and social services
- Widespread densely populated areas, service delivery reach can be challenging
- Customer service including opportunities to increase hours of operation or access to services



External Opportunities

- Geographic location, access to Greater Toronto Area and Buffalo, natural assets and greenspace
- Potential provincial or federal funding opportunities
- Emerging economic sectors, such as sports tourism and cannabis
- Explore broadband opportunities for rural areas
- Opportunities to align services to emerging higher level government priorities. Such as federal requirements for integration of services
- Enhance organization's reputation including transparency, trust and accountability



External Threats

- Provincial and federal unknowns in policy and funding
- Workforce pressures such as the inability to retain and recruit skilled workforce
- Lack of succession planning in local businesses
- Dependency on seasonal and precarious employment
- Youth and young family retention
- Increasing housing prices
- Impact of aging population on regional services and economy, however these could present as potential opportunities

Niagara Region Departmental SWOT

Office of the CAO



Organizational Strengths

- Privacy breach response, and consent management programs
- Comprehensive learning and development programs (leadership development)
- A renewed commitment to drive employee engagement to serve the community
- Experienced staff capable of meeting a wide range of public relations, graphic design and web / social media needs
- High user satisfaction with Region's website and social media channels



Organizational Weaknesses

- Workforce management (ability to recruit and retain a skilled workforce) particularly for hard to fill roles and the right fit for senior leadership
- Perceived lack of organizational transparency can lead to media and public mistrust
- Need for a review and update of communications related policies and procedures
- Resource limitations impact turnaround time for social media campaign monitoring / responses and tasks



External Opportunities

- Procedural by-law amendments with changes for public and with council
- Fully leverage technology to maximize Human Resource tools and analytics for strategic decision making
- Improve the organization's reputation
- Ability to strengthen relationship with media and public through engagement
- Create an overall strategy and direction for the Region's communications efforts
- New, more robust website platform to improve user experience
- Potential to create additional online presence where needed



External Threats

- Marketability of Niagara as a top employer, and local shortage of skilled labour and workforce talent
- Changing municipal act legislation requirements around conflict of interest, integrity commissioner, etc.
- Provincial interest arbitration decisions / impacts with consideration for ability to pay
- Urgency to address staff psychological health, prevent psychological harm and manage escalating costs
- Lack of clarity / consistent messaging can allow for misinterpretation or misinformation
- Lack of traditional communications channels and the need for more diverse channels for communication with all residents and stakeholders

Niagara Region Departmental SWOT

Office of the CAO - Economic Development



Organizational Strengths

- Collaboration with post-secondary institutions and local organizations to facilitate research and growth
- Gateway Economic Zone & Centre, Foreign Trade Zone designation
- Availability of incentives
- Relationships with local area municipal staff (Team Niagara)
- Work on GO transit and connective transportation across Niagara
- Ability to leverage our strong economic sectors
- Leveraging global brand recognition
- Niagara's Strategic Location



Organizational Weaknesses

- Consistency in application and availability of incentives, processes and designations across each local area municipality
- Need for an employment land strategy and a Niagara port strategy to better guide future planning, in development
- Lack of integrated regional transit
- Broadband not available in rural areas of the region.
- Natural gas not available in rural areas of the region.



External Opportunities

- Potential federal and provincial funding (ex. for federal designation as an Economic Trade Corridor)
- Opportunities in emerging industries (ex. cannabis, sports tourism)
- Location (GTHA Corridor, Proximity to US) for trade and to leverage growth
- Strategic initiatives (Hamilton Niagara Partnership)
- Niagara Foreign Trade Zone (working to support export orientated companies)
- Development of the Niagara District Airport
- Seaway lands available for development/partnership with the Hamilton Port Authority.



External Threats

- Provincial legislation restrictions for growth (Greenbelt and Provincially significant wetlands)
- Shortage of skilled trades and labour
- Lack of succession planning in local businesses
- Reliance on precarious employment
- Youth and young family retention
- Increasing housing prices
- Lack of shovel ready industrial land
- High hydro costs, particularly in comparison to New York State

Niagara Region Departmental SWOT

Community Services



Organizational Strengths

- Leveraging community partnerships for optimized service delivery
- Variety of services aligned to the client: supporting the unique needs of Niagara's population segments (seniors, homeless, children's etc.)
- Improvements in service delivery to provide higher value to clients (ex. BENN)
- The redevelopment project provides the opportunity to build operationally efficient LTC homes and to defer LTC placement through strategic co-location of services



Organizational Weaknesses

- Limited affordable housing stock
- Sustainable funding for services with reliability on provincial or federal funding
- Low vacancy rates; high rent costs/ increases
- Provincial funding for staffing levels in the LTC Homes remains below recommended levels for resident care and safety
- Relatively higher social assistance caseload as compared to other comparator municipality



External Opportunities

- Potential federal funding opportunities (ex. housing and homelessness services)
- Opportunities to align services/work/projects with new provincial government as priorities are identified (ex. Human services integration and coordinated intake)
- Seniors is a priority population for the province (reducing regulations, increasing LTC beds, ending hallway healthcare and focusing on the front lines)
- Opportunity to leverage technological innovations to enhance care and services in Seniors Services.
- Province has indicated greater focus on employment outcomes in Social Assistance, which aligns with Niagara's strategic work in this area.



External Threats

- Provincial funding for core services remains uncertain (pending budget anticipated early spring 2019). Some indication of policy changes. Effects could be to core services, such as social assistance, childcare, homelessness/housing and senior's care
- Historical challenges with funding allocation model for homelessness services
- Limited services available to meet the needs of seniors and the rapidly growing seniors population in Niagara

Niagara Region Departmental SWOT

Enterprise Resource Management Services



Organizational Strengths

- Centralized Finance division and Financial Specialists imbedded in each line of business facilitates promotion of fiscal responsibility, accountability and transparency
- Optimal spending decisions to benefit residents and the organization
- Continuous improvement lens through internal audit, corporate performance measures and business improvement reviews
- Building organizational maturity around data driven decisions, project management and asset management
- IT data centre with public sector partnerships (LAMs, school boards, etc.)



Organizational Weaknesses

- Gaps in resourcing needs and consistent corporate structure to manage capital assets
- Technology systems to facilitate customer service, being addressed through customer service strategy work
- Sustainable funding for services and infrastructure to deal with budget pressures



External Opportunities

- Service Sustainability review approved by Council, led by ERMS will provide strategies to address long term financial planning and sustainability
- Integration of partnerships: working with Province for additional funds beyond short term financial plans (ex. integrate with local municipalities and advocate for funding of enhancement and integration of transit; provincial or federal funding for South Niagara water / wastewater treatment plant)
- Broadband opportunities for rural Niagara



External Threats

- Costs of Development Charge discretionary exemptions puts pressure on operating budgets and ability to construct infrastructure to facilitate growth
- Provincial interest in municipal restructuring (amalgamation) – would be a large financial project
- Provincial and federal unknowns around funding and policies
- Continued growth in the region may increase pressures on Regional services

Niagara Region Departmental SWOT

Planning and Development Services



Organizational Strengths

- Optimizing natural assets in planning decisions: waterways, greenspace, urban design, etc.
- Protection of agricultural assets
- Pre-consultation meetings with developers to ensure smoother, more timely service
- Coordination and relationships with staff at local area municipal level



Organizational Weaknesses

- Differences in planning visions of local area municipalities and the Region
- Increasing demand for consideration of multiple facets to address specific planning needs (ex. Climate change, age friendly, etc.)
- Large grants and incentives portfolio, being addressed by a review



External Opportunities

- Comprehensive Plan for development in South Niagara Falls (new Hospital, employment uses). Align growth with infrastructure servicing (new Water Wastewater Treatment Plant with servicing strategy)
- Work with local area municipalities to meet their unique needs (growth)
- Work with partners internally and externally to support increasing rental and affordable housing stock
- Develop new natural systems, policies, and mapping aligned with needs and priorities in Niagara, Provincial direction, and development needs
- Employment land stock
- Include climate change in urban and rural land use policies
- Provide new guidelines for Stormwater Management and Environmental Impact Studies for greater clarity
- MOU for improved planning process for development approvals, and improved development industry processes and expectations
- Create a Niagara Region online development portal



External Threats

- Population forecasts evolve over time and are assumed by some to be static
- Urban planning regulations and policies are limited in their ability to resolve challenges that are not land use based, for example affordable housing

Niagara Region Departmental SWOT

Public Health and Emergency Medical Services



Organizational Strengths

- Partnerships with local community organizations
- Integrating data driven decisions to inform program planning and delivery
- Innovative strategies to deliver service in accessible, convenient locations for customers (ex. Health care centre of excellence model, outreach services)
- Transforming the way Niagara Emergency Medical Services (EMS) deliver service, through the EMS transformation and hub projects
- Well-educated and motivated staff



Organizational Weaknesses

- Ability to provide more services outside of typical business hours
- Integration of client information (internally and externally) as a driver of improved client service delivery and to streamline client intake
- Complexity of some health issues can pose challenges in executing strategies across sectors
- Interventions may take years to change health outcomes leading to improved health and health equity of residents



External Opportunities

- Enhance digital service delivery for clients to access services
- A corporate and public health movement towards outcome focused and data driven decisions, alignment with health outcomes (i.e. Power BI tool).
- Existing good practice in inter-sectoral cooperation can be built on and extended; multi-sectoral cooperation for the broader health determinants can be established
- Integrating data driven decisions to inform program planning and delivery



External Threats

- Potential provincial funding and policy changes with the new Ministry of Health and Long Term Care (MOHLTC)
- Emerging issues in health and unknowns (ex. Opioids, legalization of cannabis)
- Climate change impacts on environment and health status in Niagara
- Significant increases in demand on Emergency Medical Services (ex. aging population, mental health, etc.)
- Decreased trust of science and expertise
- Changing social norms (e.g. cannabis use, vaping, sedentary behaviour)
- Economic downturn

Niagara Region Departmental SWOT

Public Works



Organizational Strengths

- Working to build a connected transit system across Niagara, connecting with GO System to build a local, inter-municipal and inter-regional system
- Leveraging community partnerships for seamless transit services, roads and cycling infrastructure
- Excellent customer service with a Customer Relations Management System to ensure actions are taken in a timely and organized manor
- Strong diversion programs for the residential, industrial, commercial and institutional sectors
- Asset management – Working to further efficiency, reliability, affordability, and informed decisions to support capital investment



Organizational Weaknesses

- Distance between Niagara's densely populated areas leading to challenges in building sustainable transit networks
- On-going performance issues with the Region's Collector Contractor, being addressed
- Public desire to use public transit
- Consolidated Niagara Transit System – significant net new financial consideration
- Funding for infrastructure projects



External Opportunities

- Development Charge by-law update to include transit, as an additional funding source
- East-West Transportation Corridor to relieve traffic congestion, truck traffic on local roads and Greater Toronto Area pressures
- Innovations in service and funding opportunities
- Material recycling opportunities for road construction
- Potential for smaller funding opportunities through Federation of Canadian Municipalities (FCM) for capital projects
- New technologies in water and wastewater



External Threats

- Active transportation changes can increase maintenance costs
- Aging infrastructure, impending failure in water and wastewater systems, and the corresponding funding gap
- Increasing construction costs (trade tariffs)
- Climate change impacts (more severe or wet weather)
- Provincial and federal funding unknowns
- Provincial legislation and regulation changes (ex. divertible material service standards, Ministry of Environment surplus soil policies, MPAC restrictions on data use, Cap and Trade & Provincial Gas Tax leading to higher energy costs)

Local Area Municipal Strategy Theme Matrix

Theme	Strategic Priority	St. Catharines	Fort Erie	Niagara Falls	Lincoln	NOTL	Wainfleet	Pelham	Welland	Thorold	West Lincoln
Economic	Economic Development			x		x	x		x	x	x
	Investment	x	x		x			x			
	Planning & Development Decisions			x		x					x
	Zoning & Regulatory Tools			x		x			x		
	Downtown Businesses				x				x		
	Employment								x		x
	Economic Gateway								x		
	Engaged Workforce		x								
	Local Business Growth		x								
	Trade								x		
Environment	Agriculture				x				x		x
	Climate Change Adaptation	x						x	x		
	Environmentally Sustainable Infrastructure			x					x		
	Green Town					x				x	
	Air, Land, Water Quality								x		
	Buy-Local Initiatives								x		
	Carbon Footprint Reduction			x							
	Environmental & Convenient Transit			x							
	Environmental Protection	x									
	Green Energy										x
	Natural Asset Access										x
	Smart Growth							x			
	Water Conservation								x		
Future Outlook	Youth Retention/ Attraction			x		x			x		
	Aging in Place							x	x		
	Post-Secondary Programs		x			x					
	Attraction							x			

Theme	Strategic Priority	St. Catharines	Fort Erie	Niagara Falls	Lincoln	NOTL	Wainfleet	Pelham	Welland	Thorold	West Lincoln
Infrastructure/ Transportation	Transit		x	x	x	x			x		
	Infrastructure							x		x	x
	Multi-modal, Active Transit			x						x	
	Pedestrian-Friendly				x						x
Organizational Performance	Financial Efficiencies					x				x	
	Financial Resiliency							x			x
	Governance			x						x	
	Innovation							x	x		
	Responsible Financing		x					x			
	Staff Training				x	x					
	Talent Management			x		x					
	Corporate Value Integration			x							
	Leadership								x		
	Revenue Generation					x					
	Succession Planning					x					
	Trust							x			
Resident Life	Waterfront & Tourism		x	x	x	x			x		x
	Arts & Culture Support	x		x	x				x	x	
	Affordability	x		x					x		x
	Quality of Life	x		x			x				x
	Accessibility			x					x	x	
	History & Heritage	x							x	x	
	Parks & Recreation Support			x		x				x	
	Safety								x	x	x
	Creative Support	x		x							
	Health & Wellness								x	x	
	Health Care Delivery			x		x					
	Public Access & Involvement			x				x			

Theme	Strategic Priority	St. Catharines	Fort Erie	Niagara Falls	Lincoln	NOTL	Wainfleet	Pelham	Welland	Thorold	West Lincoln
	Taxes						x			x	
	Active Living in Senior Population					x					
	Diversity	x									
	Housing								x		
	Social Inclusion								x		
	Supporting Families								x		
Service Delivery	Communication	x	x	x	x	x	x				x
	Customer Service	x	x	x	x	x		x		x	
	Partnerships	x	x			x			x	x	x
	Technology		x		x	x			x		
	Brand Recognition			x	x					x	
	Connected	x	x								
	Public Access & Involvement			x				x			
	Personalized Services							x			
	Personalized Services							x			
	Public Services							x			
	Support for Volunteers					x					

The most current Local Area Municipality (LAM) strategies were reviewed to determine key alignments between the two levels of government. At the time of review, only 10 LAMs had existing strategies available.

**Office of the Regional Chair | Jim Bradley**

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Memorandum

TO: Regional Council**FROM:** Jim Bradley, Regional Chair**DATE:** April 4, 2019**SUBJECT:** Shape Niagara - Council Strategic Planning Workshop

As we move through the start of the 2018-2022 term of Council, and as representatives and the voice of Niagara, we must provide a clear path forward for the organization. Four years is a short amount of time to affect real significant change, which is why over the last year, staff have conducted an environmental scan and collected the ideas and input from the community to inform Council in setting this direction towards positive change.

With this information, Council will be given the significant task of developing the 2019-2022 Council Strategic Plan. This document will underpin the work of the Region for the next four years, and will provide the organization the direction needed to move Niagara forward.

On Saturday May 11, 2019, a full-day Council Strategic Planning Workshop will be held at the Armenian Community Centre in St. Catharines. It is the hope that all Regional Councillors will be able to attend, to work together in defining the goals and objectives that will create this term of Council's strategic plan.

Thank you in advance for your dedication in representing the citizens of Niagara, and to your commitment to moving Niagara forward.

Sincerely,

Jim Bradley
Regional Chair

Minute Item No. 7
Consent Items for Information

That the following items **BE RECEIVED** for information:

PBLRC-C 01-2019

Procedural By-law Review Committee History

PBLRC-C 02-2019

Procedural By-law Review Comparison Chart: Selections, Options and Considerations.

**THE REGIONAL MUNICIPALITY OF NIAGARA
PROCEDURAL BY-LAW REVIEW COMMITTEE
MINUTES - OPEN SESSION**

**PBLRC 1-2019
Wednesday, April 10, 2019
Campbell East (CE) 101
Niagara Region Headquarters, Campbell East
1815 Sir Isaac Brock Way, Thorold, ON**

Committee: Edgar (Committee Chair), Foster, Greenwood, Heit, Ip
(Committee Vice-Chair), Rigby

Absent/Regrets: Bradley (Regional Chair), Chiocchio

Staff: D. Gibbs, Director, Legal and Court Services, A.-M. Norio,
Regional Clerk, M. Trennum, Deputy Regional Clerk

1. CALL TO ORDER

Matthew Trennum, Deputy Regional Clerk, called the meeting to order at 3:00 p.m.

2. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

3. SELECTION OF COMMITTEE CHAIR AND VICE CHAIR

3.1 Call for Nominations for Committee Chair

Matthew Trennum, Deputy Regional Clerk, called for nominations for the position of Chair of the Procedural By-law Review Committee for the 2019-2020 term.

Moved by Councillor Rigby
Seconded by Councillor Greenwood

That Councillor Edgar **BE NOMINATED** as Chair of the Procedural By-law Review Committee for a two-year term (2019-2020).

3.2 Motion to Close Nominations for Committee Chair

Matthew Trennum, Deputy Regional Clerk, called a second and third time for nominations for the position of Procedural By-law Review Committee Chair.

There being no further nominations it was:

Moved by Councillor Rigby
Seconded by Councillor Heit

That nominations for the position of Chair of the Procedural By-law Review Committee for the 2019-2020 term, **BE CLOSED**.

Carried

3.3 Voting for the Position of Committee Chair

There being only one nominee for the position of Committee Chair, the Deputy Clerk announced that Councillor Edgar would be the Procedural By-law Review Committee Chair for a two-year term (2019-2020).

3.4 Call for Nominations for Committee Vice Chair

Matthew Trennum, Deputy Regional Clerk, called for nominations for the position of Vice-Chair of the Procedural By-law Review Committee for the 2019-2020 term.

Moved by Councillor Heit
Seconded by Councillor Edgar

That Councillor Ip **BE NOMINATED** as Vice Chair of the Procedural By-law Review Committee for a two-year term (2019-2020).

3.5 Motion to Close Nominations for Committee Vice Chair

Matthew Trennum, Deputy Regional Clerk, called a second and third time for nominations for the position of Procedural By-law Review Committee Chair.

There being no further nominations it was:

Moved by Councillor Greenwood
Seconded by Councillor Foster

That nominations for the position of Vice Chair of the Procedural By-law Review Committee for the 2019-2020 term, **BE CLOSED**.

Carried

3.6 Voting for the Position of Committee Vice Chair

There being only one nominee for the position of Committee Vice Chair, the Deputy Clerk announced that Councillor Ip would be the Procedural By-law Review Committee Vice-Chair for a two-year term (2019-2020).

At this point in the meeting, Councillor Edgar assumed the Chair.

4. PRESENTATIONS

4.1 Overview and History - Procedural By-law Review Committee

Ann-Marie Norio, Regional Clerk, provided information respecting Overview and History - Procedural By-law Review Committee. Topics of the presentation included:

- History
- Work to Date
- Key Facts
- Effect on Stakeholders
- Committee Goals
- Next Steps

Councillor Information Request(s):

Provide information respecting a comparison of Niagara Region's Procedural By-law and the procedures from similar-sized municipalities in Ontario and Niagara's local area municipalities. Councillor Foster.

Provide information respecting a comparison between Bourinot's Rules of Order and Robert's Rules of Order. Committee Members.

Provide a printed copy of PBLRC-C 01-2018, respecting Draft Procedural By-law and Related Materials, to the committee members. Councillor Heit.

5. DELEGATIONS

There were no delegations.

6. ITEMS FOR CONSIDERATION

There were no items for consideration.

7. CONSENT ITEMS FOR INFORMATION

Moved by Councillor Greenwood
Seconded by Councillor Foster

That the following items **BE RECEIVED** for information:

PBLRC-C 01-2019

Procedural By-law Review Committee History

PBLRC-C 02-2019

Procedural By-law Review Comparison Chart: Selections, Options and Considerations.

Carried

8. OTHER BUSINESS

8.1 Procedural By-law Review Committee Meeting Schedule

Councillor Ip requested staff conduct a poll of the Committee Members to determine a preferred meeting schedule for 2019.

9. NEXT MEETING

The next meeting will be held at the call of the Chair.

10. ADJOURNMENT

There being no further business, the meeting adjourned at 3:27 p.m.

Councillor Edgar
Committee Chair

Matthew Trennum
Deputy Regional Clerk

Ann-Marie Norio
Regional Clerk

MEMORANDUM

PBLRC-C 1-2019

Subject: Procedural By-law Review Committee History

Date: April 10, 2019

To: Procedural By-law Review Committee

From: Ann-Marie Norio, Regional Clerk

The Procedural By-law Review Committee (PBLRC) was established by Council in 2015 with the following goals:

- (a) Develop recommendations for change with a public and Councillor consultation process;
- (b) Conduct work in accordance with Council's approval;
- (c) Submit a report to Council for policy approval; and
- (d) Draft and submit a by-law for Council consideration.

The Committee held 18 meetings, including public consultation, and developed a Procedural By-law Review Comparison Chart: Selection, Options and Considerations. The Chart contains 52 themes and the selected options were highlighted in yellow. Through each meeting staff were directed to undertake research and consultation to include the directions and chosen options for inclusion in a proposed Procedural By-law.

The Committee had a meeting scheduled on March 19, 2018, to review a redline version of the By-law showing the proposed changes as directed by the Committee. The intention was to have the Committee approve the by-law and then hold a Committee of the Whole meeting to allow Council to consider those suggested changes. Unfortunately the meeting on this date did not achieve quorum and the work of the Committee stalled.

Committee members will recall that there have been some recent amendments to the By-law to ensure compliance with legislative changes. In total, the By-law has been amended 19 times, creating a document that is cumbersome to manage and difficult to read. As a result, the recommendation is that a new By-law be prepared. This will allow staff the opportunity to make housekeeping and legislative changes in addition to those suggested by the Committee. If Committee is supportive of this approach, staff will begin work on a new by-law, with continued input from the Committee.

Respectfully submitted and signed by

Ann-Marie Norio
Regional Clerk

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
1 Guiding Principles S. 2 - "General"	Maintain status quo - no principles articulated	James Lochrie's General Principles of Parliamentary Law Do not include in the by-law Note in the final report that the committee was guided by these principles.		When principles are included in by-laws they can be in conflict with each other or have unintended consequences Possible copyright issues to use Lochrie's principles verbatim Copyright has an expiry time which may or may not apply to Lochrie's General Principles .	
2 Parliamentary Authority S. 2 - "General"	Maintain status quo - continue to use Bourinot's Rules of Order	Change to other Parliamentary authority used by majority of area municipalities, specifically Robert's Rules of Order	Select another Parliamentary authority - James Lochrie	No single Parliamentary authority can contemplate every situation Two of the largest municipalities use Bourinot's Rules of Order It is helpful to consult with people using the same Parliamentary rules At this time, most members of Council are familiar with Bourinot's rules Implementing new parliamentary authority would raise education and training issues and may have unintended consequences	

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
3 Chair Ex-Officio s. 4.5 in "Role of the Chair"	Maintain status quo - Chair counts in membership number and in determination of quorum	Regional Chair ex-officio on all committees with full voting and participating rights (unless otherwise stated in a committee's terms of reference) but does not count in membership number or quorum (either for or against)	Regional Chair ex-officio on standing committees only Chair would have full voting and participating rights and be included in the membership number, and count towards quorum (for and against) Alternatively, if the Chair wanted to be on a sub-committee, then he would put his name forward and it would be voted on like the other council members	Full voting / participating member when he is in attendance Could be less confusing to say he is ex-officio on all committees (including standing) but doesn't count in membership or quorum (i.e. doesn't make or break quorum) Many sub-committees seem to be short in achieving quorum by one member. Removing the Chair from counting in the membership and quorum of these sub-committees may help them achieve quorum and conduct business The Chair, in some situations, assists in gaining or maintaining quorum If the Chair assists in gaining or maintaining quorum could result in confusion when he leaves the meeting and there is no quorum; does the meeting adjourn at that point? May also put the Chair in an awkward position if he needs to leave but will cause a loss in quorum	

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
4 Chair Voting	Maintain status quo - Sec 4.6 - The Chair shall only vote in a Council meeting to break a tie vote	Regional Chair votes during all recorded votes - including at Council	Regional Chair votes on every vote	A sense of impartiality is created with the Chair not voting Each member of Council is entitled to a vote and voting provides the opportunity to be accountable for decisions No other requirements of past legislation apply (i.e. Region of Niagara Act).	
5 Schedule and Time of Meetings S. 5 - "Regular Meetings of Council and Committee of the Whole" S. 22 - "Committees"	Maintain status quo - 3-week cycle and time of Council meetings and add wording in PBL related to 3-week cycle	Start Council meetings earlier	Change to a 2- or 4-week cycle	Changing from a 3-week cycle is problematic in that there are limited times when the area municipalities would not be meeting Starting Council earlier would allow more time for Council to do its business but may be problematic on timing for members The difficulty with starting early is there is no guarantee it will not go equally late	

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
6 Reports/Agenda Items s. 22.15 and 22.16, in "Committees", Sec 11.3	Maintain status quo of 22.15 and 22.16 Provide hardcopies of addendums Add rules surrounding addendum items More rigorous with deadlines to minimize late reports Consider motion to add addendum items; amendment to agenda to add each addendum item Develop options for timing of agenda release day (i.e. Monday of week of Council meeting vs Friday week before)	Include report deadlines and addendum criteria in the By-law Vaughan s. 6.4: An item that is not on the agenda for Council as printed shall require a unanimous vote of the members present to be added to the agenda	Do not include a reference in the PBL for report deadlines or addendum criteria. Develop internal staff procedures for these matters	Adjust report deadlines so that reports are written closer to the date of a meeting. Adjust deadlines for committee items and include deadlines in the by-law to be consistent with noted deadlines for Council agenda items Requiring a motion to introduce late items would reduce flexibility	
7 Committee Rules of Procedure S. 22 - "Committees"	Maintain status quo Sec 22.14: The Rules of Procedure contained in this By-law shall be observed in Committee meetings, with necessary modifications, except that: (a) the number of times a Member may speak on any question shall not be limited; (b) the length of time a Member may speak on any question shall not be limited; (c) written Notices of Motion are not required; and (d) Members shall not be required to stand to speak	Standing Committees have the same set of rules as Council, as much as possible, and set out in the Procedural By-law 5-minute speaking limit at Council 10-minute speaking limit at committee and COTW, may only speak once unless granted leave of committee	Not all rules of Council should be applied to standing committee (i.e. speaking length and curfew, etc.). Request staff to develop committee rules that reflect this Committees other than Standing Committees have slightly different set of rules - allows for more flexibility	Not all rules of Council should be applied to committee Provide flexibility in procedural rules for the sub-committee level Need to balance flexibility with consistency Develop some consistency in rules between various meeting groups (i.e. Council, standing committee, committee of the whole, sub-committees) Another option is that Councillors be given unlimited time to gain information (i.e. questions on the report) but limited "debate time"	

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
8 Motions, General S. 19 - "Motions"	Maintain status quo of Section 19.1 Ensure related items in Theme 28 "Notices of Motion" are addressed.	Do not require motions to be in writing	Require Councillors to provide Clerk's with motions/amendments during meeting for display when possible	Option 2 may lead to a lack of clarity of what council or committees are voting on Revise requirement that a motion can be withdrawn at the permission of Council - simplify so that a mover can withdraw motion on own accord	
9 Friendly Amendments s. 19.10 in "Motions"	Maintain status quo Procedural By-law is silent	Develop definition of friendly amendment for example: Define as: "Friendly amendment means an amendment put forward by a Member that is accepted by the mover and seconder of the motion as a change that can be incorporated into the motion as if that wording was part of the motion that was initially put on the floor for consideration" If the mover and/or seconder do not agree with a friendly amendment, then it can be put forward as a formal amendment to change the wording as desired * Ensure it does not change the spirit or intent of the motion but rather clarifies and improves the intent * Allow Clerk to make minor changes * Only allow at committee	Do not permit friendly amendments - all changes to wording would be addressed via formal amendments, moved, seconded and voted on	Friendly amendments can help business quickly proceed This whole subject area raises the question of seeking input in advance of wording motions. Not for substance, but for clarity	

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
10 Curfew - Council	Maintain status quo - 10:30 p.m. unless extended to 11 p.m. by an affirmative vote of the majority of Members present Change 19.6 to have extend curfew as first priority motion Consider including curfew info in 16.5	Permit extension past 11:00 p.m. without 2/3 requirement	Set curfew at 10:30, no 1/2 hour extension, just go right to suspending rules but have the members specify the end time or what specific items are to be dealt with	The Committee is considering limiting the length of meetings through other mechanisms (i.e. speaking time, delegations, etc.) which may reduce the need to change curfew rules Consider permitting extensions to consider specific items only, deferring remaining items to the next meeting	
11 Curfew - Committee s. 5.4 in "Regular Meetings of Council and Committee of the Whole"	Maintain status quo Procedural By-law is silent	3-hour curfew with maximum extension of 30 minutes; no suspending of rules to go beyond 3.5 hrs	2.5-hour curfew with maximum extension of 30 minutes; no suspending the rules to go beyond 30 minute extension.	Curfew for all committee meetings allows members a break between meetings (especially during standing committee meetings) Curfew for committee meetings may result in more focused discussion and decision-making	
12 Informal Meetings in the event of no Quorum being achieved	Maintain Status quo Procedural By-law is silent; however, currently, any members present continue to meet informally	Explicitly preclude such informal meetings in the PBL	Allow informal meetings but provide specific rules surrounding what can and cannot take place. Include rule on how to formally adopt a presentation at a subsequent meeting (i.e. include presentation slides as correspondence item with covering memo).	Risk that these informal meetings might be construed as meetings in the event of an open meeting complaint. Informal meetings must remain open to the public. No closed session matters may be discussed informally. Consider amendments proposed by Bill 68.	

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
13 Quorum - Achieved, Lost or Regained S. 8 - "Quorum"	Maintain Status quo of Sections 8.3 and 8.4 Include flexibility for meeting to continue informally (i.e. if lost during the delivery of a presentation)	No time limit if quorum is lost, Committee Chair is to determine if quorum can be found	Loosen quorum requirements at advisory committees (i.e. adjust quorum from 50% plus 1 to a different percentage of members)	If there is no fixed time for loss of quorum there may be a lack of transparency and potentially members may be waiting for much longer than 15 minutes to regain; not a valuable use of members' time Concerns about quorum lost being used during a meeting as a political tool Implement an audible sound in areas around Council Chamber when quorum is lost or when need to call back the members Consider amendments proposed by Bill 68.	
14 Speaking Length/Number of Times at Council s. 16.4 in "Rules of Debate"	Maintain status quo	Limit speaking time to five (5) minutes in Council meetings	Limit speaking time to five (5) minutes in Council meetings but permit speaking a second time with leave of a majority of Council At the Chair's discretion whether to offer the mover of a motion the opportunity to speak last.	Debate and questioning should be encouraged at Committees Limiting time may restrict or frustrate debate and information gathering Should length of time for staff to speak be limited? Members' speaking time should not include responses from staff (raises issues about tracking the time)	
15 Speaking Length/Number of Times at Committee s. 16.4 in "Rules of Debate"	Maintain status quo	Limit speaking time to five (5) minutes in Committee meetings but allow increased speaking time with leave of Committee	Limit speaking time to five (5) minutes but can speak a second time after all members who wish to speak for a first time have done so	Should length of time for staff to speak be limited? Members' speaking time should not include responses from staff (raises issues about tracking the time) Limiting time may restrict or frustrate debate and information gathering	Option 3 from Theme 14 but altered as follows: Limit speaking time to ten (10) minutes in Committee meetings but permit speaking a second time for a maximum of five (5) minutes with leave of the majority of Committee. Provide more flexibility with speaking time and number of times at subcommittee meetings. At the Chair's discretion whether to offer the mover of a motion the opportunity to speak last.

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
16 Presentations s. 13.9 in "Delegations and Presentations"	Maintain status quo	Limit presentations to 5 minutes and maintain current process of limiting the number of presentations on an agenda	Set time limits for questions to presentations at council or committee to a pre-determined time	<p>Clearly define "presentation" (i.e. presentations are for ceremonial and protocol related matters) to supplement current definition</p> <p>Require speaking notes submitted prior to issuance of agenda</p> <p>An alternative is to eliminate questions/comments entirely</p>	Use the definitions of ceremonial presentation and presentation from the City of Vaughan Procedural By-law with wording from subsection 2.4(2) be included subject to any necessary modifications, including the removal of the word "jurisdiction".
17 Delegations S. 13 - "Delegations and Presentations"	Maintain status quo	<p>Delegations permitted at Council (5 minutes).</p> <p>Delegations permitted at Committee (10 minutes).</p> <p>Max. of three delegates per topic at Council with max. of five delegates in total at one meeting.</p> <p>Council delegations are determined on a first come first served basis.</p> <p>A member is only permitted to ask questions of a delegate for five minutes.</p> <p>Not permitted to appear as a delegate on matters that Council has already decided upon.</p>	<p>No delegates permitted at Council - must go to standing committees</p> <p>Comments can be received through correspondence</p>	<p>Desire to tighten criteria that would allow delegations at Council but with greater focus and transparency</p> <p>No delegates at Council if already was a delegate at Committee, regardless of new information. Must provide new information via correspondence.</p> <p>Deadline for submitting delegation request not in alignment with the time to post the agenda.</p> <p>Require delegates to provide details about the message to be delivered; submit presentation materials (i.e. speaking notes, slide deck) at time of request or before agenda publication; create a mandatory delegation request form (electronic or hardcopy) that must be completed; online form has ability to upload attachment</p> <p>Reduce or impose a time limit for cllrs' questions to delegates</p> <p>Clearly define "delegate" and "detailed brief"</p> <p>Provide options for a person to delegate in alternate methods (i.e. video, letter, etc.)</p> <p>Could be perceived by public that council is cutting off contact</p>	<p>Prepare definitions of Presentations and Delegations</p> <p>Differentiate between ceremonial, staff, consultant, ABC, public-driven presentations</p> <p>No questions/discussion on ceremonial presentations</p> <p>Limit to five (5) minutes delegations and 10 minutes for questions</p> <p>Establish triage rules similar to other municipalities (i.e. Hamilton, Oxford)</p> <p>Establish rules of decorum for public delegating or just attending.</p>

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
18 Reconsiderations s. 19.16 in "Motions"	Maintain status quo 2/3 members of present	Establish higher standards - 2/3 of all members of council	Establish that cannot waive notice requirement for reconsideration motions	Setting of higher standards/requirements reflects the gravity of revisiting Council's decision after its deliberations Higher standards may reduce flexibility Not waiving notice requirement allows staff to thoroughly research the matter to ensure the reconsideration is valid	Use the definition of a motion to reconsider from the County of Simcoe Procedural By-law.
19 Code of Conduct appendix to PBL S. 15 - "Code of Conduct"	Maintain status quo	Establish Code of Conduct as a separate by-law		The Code of Conduct is subject to review Including the Code of Conduct in the PBL provides ease of reference - one-stop source of Council-related policy	
20 Committees/Meetings under the Municipal Act	Maintain status quo	Amend the PBL to conform with the requirements of the Municipal Act		PBL definition for the application of open meeting requirements exceeds the legislated requirements of the Municipal Act and establishes a far higher bar (reference Ombudsman Report dated May 13, 2015) Maintaining status quo may lead to the risk that any meeting not open to the public might be construed as an illegal meeting in the event of an open meeting complaint	
21 Definition of Committee s. 1.1 (d), (e), (j), (aa) in "Interpretation"	Maintain status quo	Revise the definition of standing committee: "Standing committee means a committee composed of Members and directly aligned to a department of Niagara Region." Add reference to by-law to establish standing committees (BL 35-2014)	Definition based on York Region and City of Hamilton: Committee means any advisory or other committee, subcommittee or similar entity established by Council of which at least 50% of the members are also members of Regional Council, and including but not limited to COTW, Standing Committee, a special Committee or Task Force	Clarify definition of standing committee so that it reflects those aligned to Corporate departments Align definition of committee to the requirements of the Municipal Act, specifically: s238(1) Committee - defined "committee means any advisory of other committee, subcommittee or similar entity of which at least 50 per cent of the members are also members of one or more councils or local boards"	Prepare definitions of committees, including standing committees Consider definitions that will provide some informality/flexibility in how a subcommittee conducts its meetings Consider listing the name of the standing committees in the definition or body of by-law

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
22 Mechanisms to Limit Debate S. 16 - "Rules of Debate"	<p>Calling the question: include language that will provide for a clear distinction between the mover of the motion and the "next speaker" (s. 19.15 in "Motions"); specifically, the first speaker to a motion cannot call the question or close the speakers list to limit debate.</p> <p>The mover of a motion must specify whether or not he/she wishes to speak to the motion.</p> <p>Increase the parameters for "calling the question" (s. 19.15 in "Motions")</p> <p>Clarify rules surrounding closing the speakers list</p>		<p>Include a provision on a per meeting basis to shorten amount of time for questions/debate</p>	<p>A motion to call the question can be floored when there are X number of speakers or less on the speakers list</p> <p>Combine rules to close speakers list with rules to call the question</p>	
23 Motion to Refer s. 19.11 - "Motion to Refer"	Maintain Status Quo	Permit the debate of the reasoning behind a member putting forward a motion to refer or defer	Increase education about the term "refer"	<p>Terminology of referrals/deferrals requires greater education</p> <p>Opening up debate on the reasoning behind a member putting forward a motion to refer/defer will increase meeting length</p>	Use the definition from the City of Vaughan Procedural By-law and require that a motion to defer include the word "direct".
24 Motion to Defer s. 19.13 - "Motion to Defer"	<p>Maintain Elements of Status Quo</p> <p>Align with rules surrounding a motion to refer so no or few differences (i.e. debatable for specific reasons, not amendable).</p> <p>Debatable only with respect to the rationale for or not for delaying the decision.</p>	Permit the debate of the reasoning behind a member putting forward a motion to refer or defer	Increase education about the term "defer"	<p>Terminology of referrals/deferrals requires greater education</p> <p>Opening up debate on the reasoning behind a member putting forward a motion to refer/defer will increase meeting length</p>	Use the definition from the City of Vaughan Procedural By-law and require that a motion to defer include the word "postpone".

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
25 Recorded votes s. 20.10, 20.11, and 20.12 in "Voting Procedures"	Maintain status quo	Consider all votes at Council to be recorded votes, save for those on procedural motions	Recorded votes only permitted at Council Peel Region: Part VI 2(a) Recorded votes may only be taken during a Regional Council meeting Halton Region: 1.1(ee) "Recorded Vote" means a vote taken in a Council Meeting for which the names of each Member present and whether he/she voted in favour of or against the Motion is recorded in the minutes York Region: s. 22.7 and 23.2 provide for no recorded votes in Committee of the Whole or any of the Committees	Requiring all votes at council to be recorded will slow meeting Staff are currently looking at shortening time to take recorded vote electronically Other models could be considered: not permitting recorded votes at committee but that could lead to lack of transparency and accountability Disallow recorded votes on procedural motions (i.e. call the question, refer, defer, etc.) Option 2 could be considered most appropriate for transparency Reduce amount of time permitted for electronic voting	
26 Other Business Listed as Agenda Item s. 11.1 (o) in "Council Agenda"	Maintain status quo Procedural By-law is silent (not defined)	Members to provide items of other business in advance of the meeting to provide staff an opportunity to gather information/response	Change "Other Business" in Council to "Announcements" and require members to submit their announcements to the Clerk in advance of agenda publishing	Does not take into consideration emergent matters Puts onus on members to submit information to the Clerk Significant matters should be brought forward under Notices of Motion - permits greater consideration of issues and openness and transparency to the public Option 2 or Option 3 seem appropriate if this item is not changed to announcements only. Staff would suggest a definition of matters that are time sensitive be developed (as determined by Council vote). Anything not voted as time sensitive should be by Notice of Motion or Notice of New Business Matter both of which would be brought to the next meeting	Use the wording from subsection 18.3 of the Town of Lincoln Procedural By-law entitled "Councillor Enquiries" which includes a provision that no debate be permitted.

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
27 Cancellation of Meetings S. 5 - "Regular Meetings of Council and Committee of the Whole"	Maintain status quo Procedural By-law is silent	Where circumstances warrant, the Chair may cancel one or more regular meetings of Council or Committee if, in the Chair's opinion, such meetings are not necessary for the proper conduct of the business of the Region. It is requested that the rationale for the cancellation be provided whenever possible. Proper notice of the cancelled meeting must be posted.		Consideration should be given to requiring notice of cancellation (i.e. 48 hours) Include wording that would permit the Members to petition to continue with a meeting the Chair is proposing to cancel A cancellation only provides greater transparency and accountability	
28 Notice of Motion S. 18 - "Notices of Motion"	Maintain current wording in addition to Options 2 and 3.	Require motions submitted under Section 18 be seconded before placed on the agenda and indicate on agenda the name of the seconder	Leave it to the discretion of the mover to read or not read the motion in its entirety	Amendments to motions made at meeting, not beforehand Clarify that members can withdraw their motion Not reading could streamline/shorten meeting	
29 Point of Order S. 17 - "Points of Privilege and Order"	Maintain status quo	Define points of order with greater detail. Create separate section in by-law for point of order. Consider using wording from James Lochrie's definitions.		Educate members on points of order through training and/or written material	

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
30 Point of Privilege S. 17 - "Points of Privilege and Order"	Maintain status quo	Define points of order with greater detail. Create separate section in by-law for point of privilege. Consider using wording from James Lochrie's definitions.		Educate members on points of privilege through training and/or written material respecting respectable behaviour in meetings	
31 Votes Requiring 2/3 Majority s. 2.4 and 2.5 in "General" s. 16.3 in "Rules of Debate" s. 18.2 in "Notices of Motion" s. 19.16(d) in "Motions"	Maintain status quo	Change to 2/3 of all members		Require a higher standard to amend Procedural By-law (i.e. 2/3 of all members)	
32 Requirements to Amend PBL s. 2.5 in "General"	Maintain status quo	Amendments to the Procedural By-law require 2/3 majority of all members of Council	Clarify 2/3 vote must be achieved during policy debate not enactment of the by-law	Consider setting a higher standard for changing portions of the by-law	
33 Inaugural S. 24 - "Post-Election Procedure"	Eliminate prescription to allow more flexibility in planning the event but ensure it aligns to legislative requirements.	Subject to legislative requirements, conduct open vote for Regional Chair	Permit nominees to speak for 10 minutes Permit nominees to be questioned by members but with clear parameters In the event of a tie vote, clarify a new process that would include a 10-minute recess followed by the next vote In the event of a second tie, recess for 10 minutes, on 3rd tie vote the Regional Clerk to pull name from a hat Replace invocation with a moment of silence	More flexibility could allow for the event to be held over two days which would assist the newly elected Chair in making any necessary arrangements	

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
34 Council Minutes	Clarify that minutes are presented at Council meetings for adoption purposes of confirming omissions and/or errors. Consider wording motion respecting minutes as "BE ADOPTED" not "BE APPROVED"			Streamline debate Cannot delegate on Council minutes Cannot raise discussion on matters that were already debated as captured in the minutes	
35 Committee Recommendations/Minutes of Meetings s. 14 - "Minutes of Meetings"	Maintain status quo	Work from a summary of committee recommendations at Council as opposed to the sets of minutes (s. 14.6 in "Minutes of Meetings")		Include a consolidated version of a motion in the committee minutes Assign a numbering sequence to final recommendations in committee minutes Minute Number ineffective since there can be a lot of motions contained in one minute item Committees must put forward a recommendation to Council on a matter (i.e. defeated motions = no recommendation) or pass a motion to refer the matter to Council for consideration	
36 Economic Development BL 35-2014	Maintain status quo - report directly to Council	Align with an existing standing committee	Separate committee that would meet following one of the 4 existing standing committees on the legislative schedule	Link with Planning & Development Committee due to ability to view long term planning with an economic development lens Link with Corporate Services Committee due to the initiatives from Economic Development relate to financial matters If stand-alone committee, then schedule every six weeks with meeting dates to fall immediately after Public Health and Social Services Committee	Implement decisions per adoption of Report CLK 05-2017: Economic Development report to Planning and Economic Development Committee

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
37 Councillor Information Requests S. 19 - "Motions"	Maintain status quo	CIRs that are requests for staff to prepare information/reports must be in motion form at Committee and Council		CIRs are sometimes substantive and seems of interest to only one member or another Provide delineation between a CIR and a staff direction. Include language that will guide when a request requires a motion Consider renaming CIRs to "Tasks" to be consistent with eSCRIBE language and the way this mechanism is used	
38 Voting Procedures S. 20 - "Voting Procedures"	Maintain status quo	Permit re-voting to accommodate members who did not sign-in		Staff can lower time for electronic votes Issue of members failing to sign-in and asking to re-vote	
39 Appoint Acting Chairs/Vice Chairs following Election s. 24.6 (c) in "Post-Election Procedure"	Maintain status quo	Eliminate requirement to appoint Acting Chairs/Co-Chairs for the Standing Committees under the premise that the Regional Chair will assist with agenda management for those groups until their Chairs/Vice Chairs/Co-Chairs are selected		Selecting Acting Chairs/Vice Chairs is time consuming and unnecessary when the Regional Chair can provide any guidance to staff	
40 Budget Review Committee Chair/Vice Chair s. 5.9 in "Regular Meetings of Council and Committee of the Whole"	Maintain status quo	Appoint Chair/Vice Chair for the term of Council	Be consistent with the appointments process of Chairs/Vice Chairs for all other committees (i.e. CSC, PHSSC, PWC, PDC) by requiring the appointment of BRC Chair/Vice Chair be made at a meeting of the BRC, not at Council.		

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
41 Council Agenda S. 11 - "Council Agenda"	Maintain status quo - but replace "Invocation" with "Moment of Silence" Adjust deadlines for Council agenda and addendum items 24 hours ahead of existing deadlines	Replace Other Business at Council with Announcements Move Disclosure of Pecuniary Interest to before Adoption of the Agenda Move Adoption of Minutes after Adoption of the Agenda Move Presentations and Delegations to before Chair's remarks	Options outlined in correspondence from Councillor Baty: New Business: provides the ability to have items brought forward that may not be announcements or require notices of motion Moment of Silence: dispense with entirely or specify conditions National Anthem: display most current wording include instrumental accompaniment	Limit number of items submitted directly to Council Include a clause that will give flexibility, as necessary, for putting together the council agenda (i.e. ability to move motions to following delegations on matter) Remove ability to "add items to the agenda" since it seems to lack transparency (i.e. CWCD 429-2016)	
42 Committee Agenda S. 22 - "Committees"	Maintain status quo Order of standing committee agenda not listed in Procedural By-law	Mimic as far as possible the Council agenda i.e. add in adoption of the agenda include order of standing committee agenda in the PBL	Require Other Business items to be in writing Provide more structure for new business Require new business items moved and duly seconded	Include a clause that will give flexibility, as necessary, for putting together the committee agenda Remove next meeting section Include deadlines for items Consider including a Notice of Motion section Some members do not agree with limiting other business at committee since that is where most of their questions / issues can be addressed Continue to encourage members to contact Commissioners with questions on matters that would otherwise be raised in Other Business Perhaps consider a "Business for Future Meeting(s)" section	

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
43 Closed Meetings/Recording of proceedings	Maintain status quo	Regional Clerk to audio record Closed Session meetings Legal services to retain audio recordings Staff to work with IT to ensure technology is appropriately configured to record audio from closed session		Not a legislated requirement Considered a best practise by the Ontario Ombudsman to permit easier investigations of Closed meeting complaints Potential legal implications for the corporation There would be potential legal implications to the Corporation and it would ease both investigation and the possibility of finding technical breaches which, by their nature, may be hard to avoid. If undertaken, Legal suggests additional rules, for example, regarding the structure of closed session	
44 Closed Session S. 9 - "Public Access to Meetings" S. 11 - "Council Agenda"	Maintain status quo Keep reference to legislation in the PBL for easier reference Maintain position of closed session on Council agenda	Remove reference to legislation in PBL.		Educate members on how to adopt committee recommendation related to a closed session matter should they wish to discuss the confidential item (i.e. That recommendations from the PWC meeting held on date BE ADOPTED save and except for recommendation #X related to confidential matters etc.) Consider if closed session should be earlier on the agenda which may reduce inadvertent references to matters that should perhaps be in closed session	
45 Committee Consent Agenda s. 22.21 in "Committees"	Maintain status quo Ensure appropriate rules of procedure are enforced			Clarify whether an item in consent agenda needs to be separated to be discussed. Educate members that no motion is needed to separate an item out of the consent agenda as per Sec. 19.18	

**PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS**

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
46 Streamlining Provisions	Maintain status quo	Incorporate the policy/procedure contained in Report CLK 04-2015 on committee processes streamlining proposal into the PBL Include procedures for where/how the item is placed on an agenda.	Incorporate the policy/procedure contained in Report CLK 9-2014 on the appointment process to Committees and ABCs into the PBL	Sec. 22.30 and 22.31 and Report CLK 04-2015	
47 Statutory Public Meetings s. 22.32 in "Committees"	Generalize the language so that it applies to any statutory public meeting held at a committee or Council meeting			Include clause that will give flexibility for laying out the order of the public meeting	
48 Temporary Vacancies S. 23 - "Temporary Vacancies"	Maintain status quo - no consideration for temporary vacancies for Regional Councillors	Include provision(s) for temporary vacancies left by regional councillors not holding a mayoral position in a local municipality		Possibly portions of Halton Region's PBL Part 4 - Absence and Alternates would work but in Halton alternates are only appointed for Committees, not Council	
49 Council Weekly Correspondence Distribution no existing section - perhaps create new section	Maintain status quo - no reference in Procedural By-law	Include the policy on the weekly distribution into new by-law		Refer to Report CLK 09-2014	

PROCEDURAL BY-LAW REVIEW COMPARISON CHART:
SELECTIONS, OPTIONS AND CONSIDERATIONS

Theme	Option 1	Option 2	Option 3	Considerations	Members' Comments
50 Editorial Changes no existing section - perhaps add to S. 2 - "General"	Maintain status quo Procedural By-law silent	Halton Region: 2.7 Administrative Corrections – by Clerk The Clerk shall be permitted to make minor clerical, typographical or grammatical corrections to any Committee/Council record or documentation, including but not limited to: by-laws, Motions, resolutions, agendas and/or minutes. Said corrections are to be made to ensure correct and complete implementation of the decisions and actions of the Committee/Council		Allows for changes that would improve clarity (i.e. amend the names of Committees if noted and subsequently changed); formatting (i.e. bullet numbering)	
51 Alternates at Committee no existing section - perhaps add to section involving general information on Committees	Maintain status quo Procedural By-law is silent	Define rules around rights of alternates		The Transportation Steering Committee and the Agricultural Policy and Action Committee both have members with alternates Halton Region: Part 4 - Absence and Alternates Large section on absences and alternates	
52 Public Decorum at Meetings (including use of signs, placards, buttons, etc.) no existing section	Maintain status quo Procedural By-law is silent	Define rules surrounding public decorum at meetings including use of signs, placards, buttons, etc. based on best practices of other municipalities.		May want to include language that would give the Chair or a Committee Chair the authority to remove a member of the public from a meeting if the person is disrupting the proceedings or in any way breaching the rules of decorum.	

Minute Item No. 6
Consent Items for Information

That the following items **BE RECEIVED** for information:

COTW-C 05-2019

A memorandum from A.-M. Norio, Regional Clerk, dated April 11, 2019, respecting Next Steps - "Final Report" Niagara Region Independent External Governance Auditor

COTW-C 06-2019

A memorandum from A.-M. Norio, Regional Clerk, dated April 11, 2019, respecting J. Mascarin Draft Code of Conduct

**THE REGIONAL MUNICIPALITY OF NIAGARA
COMMITTEE OF THE WHOLE
MINUTES**

**COTW 03-2019
Thursday, April 11, 2019
Council Chamber
Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON**

Committee: Bradley (Regional Chair), Bellows, Bylsma, Campion, Chiocchio, Darte, Diodati, Disero, Edgar, Fertich, Foster, Gale, Gibson, Greenwood, Heit, Huson, Jordan, Junkin, Insinna, Nicholson, Redekop, Rigby, Sendzik, Steele, Ugulini, Villella, Whalen, Witteveen

Absent/Regrets: Butters, Easton, Ip, Zalepa

Staff: H. Chamberlain, Director, Financial Management & Planning/Deputy Treasurer, D. Giles, Director, Community & Long Range Planning, C. Habermehl, Acting Commissioner, Public Works, T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, Dr. M. Hirji, Acting Medical Officer of Health, A.-M. Norio, Regional Clerk, M. Trennum, Deputy Regional Clerk, R. Tripp, Acting Chief Administrative Officer

1. CALL TO ORDER

Regional Chair Bradley called the meeting to order at 6:35 p.m.

2. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

3. PRESENTATIONS

3.1 "Final Report" Niagara Region Independent External Governance Auditor

"Final Report" Niagara Region Independent External Governance Auditor

Dr. Timothy Cobban, Andrew Sancton Consulting Limited, provided information respecting "Final Report" Niagara Region Independent External Governance Auditor. Topics of the presentation included:

- Councillor Remuneration
- Councillor Expenses
- Non-Financial Resources for Councillors
- Code of Conduct
- A "Review Framework" for Regional Council

4. DELEGATIONS

There were no delegations.

5. ITEMS FOR CONSIDERATION

There were no items for consideration.

6. CONSENT ITEMS FOR INFORMATION

Moved by Councillor Edgar

Seconded by Councillor Nicholson

That the following items **BE RECEIVED** for information:

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COTW-C 06-2019

A memorandum from A.-M. Norio, Regional Clerk, dated April 11, 2019, respecting J. Mascarin Draft Code of Conduct

Carried

7. OTHER BUSINESS

There were no items of other business.

8. NEXT MEETING

The next meeting is scheduled for Thursday, May 2, 2019 at 6:30 p.m. in the Council Chamber.

9. ADJOURNMENT

There being no further business, the meeting adjourned at 7:48 p.m.

Jim Bradley
Regional Chair

Matthew Trennum
Deputy Regional Clerk

Ann-Marie Norio
Regional Clerk

FINAL REPORT

Prepared by Andrew Sancton Consulting:

Dr. Andrew Sancton

Dr. Timothy Cobban

April 5, 2019

Niagara Region Independent External Governance Auditor

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Niagara Region Independent External Governance Auditor

1. INTRODUCTION

We are pleased to submit our second and final report as Independent External Governance Auditor for Niagara Region. This *Final Report* follows our *First Report* (dated 6 December 2018 and presented to Regional Council on 13 December 2018), and our *Fact Book* (dated 30 September and presented to Regional Council on 4 October 2018). It presents the findings from the second and third phases of our *Work Plan*, and addresses the following subjects:

- Councillor remuneration
- Councillor expenses
- Non-financial resources for councillors
- Code of Conduct
- A “review framework” for representation on Regional Council.

2. COUNCILLOR REMUNERATION

The second phase of our Work Plan, approved by Regional Council at its meeting on 26 July 2018, required that we provide our analysis and recommendations concerning the remuneration members of Niagara Region Council. Compensation for members of Niagara Regional Council has become an issue in large part because of recent changes to the *Income Tax Act*, which no longer allow municipalities—such as Niagara Region—to declare one-third of politicians’ salaries as expenses and thus tax-exempt. As we explained in our *Fact Book*, many—perhaps most—municipalities have responded to the elimination of the tax exemption by adjusting councillors’ salaries upwards to offset the income lost to the additional taxation, while at least some municipalities have chosen to leave their salaries unchanged. As we also document in our *Fact Book*, the salaries of the members of Niagara Regional Council (including the Chair) are the lowest among Ontario’s regional governments, but its council is also the largest and its population and annual operating budget the smallest.

During our consultations, (see the Introduction to our *First Report*), about one-third of respondents indicated that they thought the salary for regional councillors was too probably too low, given the demands on their time to attend community functions, prepare for and attend council and committee meetings, and to meet with and serve citizens. About one-half of respondents thought that the salary was probably fair, though some thought that councillors’ salaries should be “topped-up” in response to income tax changes. At the public meeting, there appeared to be little support for increasing council remuneration.

Niagara Region Independent External Governance Auditor

As we wrote in our *Fact Book*, there is little that can be said with any certainty about determining appropriate levels of compensation for elected officials. In Niagara Region, our consultations revealed that nearly everyone thought that the position of a regional councillor was a part-time position, and should be compensated as such. We agree. Many of those we interviewed also explained that financial compensation was not a main motivation in their decision to run for regional council. This was especially true for those that had retired from their professions with healthy pensions, or had other significant sources of income or wealth. No one—including us—wants politicians that are primarily seeking to enrich themselves through elected office. But it is important that the compensation be sufficient enough so that the position of regional councillor remains accessible to individuals from a variety of socio-economic backgrounds.

At least one respondent raised the possibility of tying council remuneration more directly to local economic conditions. In the City of London, where we both reside, a citizen task force reviewing council compensation recommended exactly this in 2017, and councillors' salaries were set to equal median employment income for full-time, full-year workers.¹ As we previously stated, we do not believe the role of regional councillor in Niagara should be viewed as a full-time position. A more appropriate statistical measure for Niagara Region, therefore, might be median total income, a figure which includes those who work part-time as well as those who are fully employed. As reported in the 2016 Census, this figure is \$31,601 for Niagara Region.² Adjusted for inflation using monthly consumer price index data, this amounts to \$33,894 in 2019. However, as this exercise has just demonstrated, the selection of this particular statistic over the alternatives is somewhat arbitrary. Median total income probably *is* a better choice than median full-time income because the former includes part-time workers while the latter excludes them, but the main reason to prefer it is that the dollar amount (\$33,894) is much closer to the current salary for regional councillors than the one calculated using median full-time income (\$53,382). Because the selection of the appropriate statistic is arbitrary, and because the connection between regional councillors and local economic performance is a tenuous one at best, we prefer adopting a simpler approach. Our recommendation is that:

Remuneration of the Regional Chair and councillors be increased to sufficiently offset the loss in after-tax income due to the removal of 1/3rd federal income tax exemption.

¹ <https://pub-london.escrimetings.com/filestream.ashx?DocumentId=32906>

² <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CD&Code1=3526&Geo2=PR&Code2=35&Data=Count&SearchText=Niagara&SearchType=Begin&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=3526&TABID=1>

3. COUNCILLOR EXPENSES

3.1 *Limits*

From our investigations and consultative process, it is clear to us that the current council expense policy needs improvement. Almost everyone we spoke to was in favour of imposing limits on councillor expenses. As we note in our *Fact Book*, this can be accomplished in different ways. One approach is to establish an overall budget limit for expenses for each member of council, either annually or per four-year council term. The difficulty with such an approach for Niagara Region is that it may not be possible to set a budget limit that is fair and appropriate for all councillors, enables them to perform their various functions and duties, and still acts as an effective constraint on spending. An expense limit designed to cover the cost of producing and mailing a modest annual newsletter for regional councillors elected at-large in St. Catharines, for example, would not be very relevant to a councillor undertaking the same activity in Wainfleet. A similar example can be made using mileage; obviously councillors in Grimsby have farther to travel to attend council meetings than do those in Thorold. We do not oppose creating an overall budget limit for individual councillor expenses. But, for the reasons we identify above, we think it will be more effective if the existing council expense policy is amended to include the following changes:

3.11 *Conference attendance*

There is currently no limit on the number of conferences councillors can attend in a given year, or on the number of councillors that can attend any particular conference. We recommend:

That councillors may attend up to 3 conferences per year of two or more days in duration requiring overnight accommodations. Conferences must be related to their duties as a Regional Councillor, and they must register as a Regional Councillor (i.e., not as a Mayor). Conferences must be located within continental North America. No more than 4 council members may attend any one particular conference. Exceptions to these stipulations require approval of Council.

3.12 *Annual newsletter*

We understand that newsletters are an important means through which municipal councillors communicate with their constituents. We recommend:

That councillors be reimbursed for the expenses of producing and distributing 1 newsletter annually.

3.13 *Mileage*

Niagara Region Independent External Governance Auditor

It was made clear to us during our consultations that there has been controversy surrounding when mileage should be claimed for regional councillors. In our view, it is perfectly appropriate for regional councillors to be reimbursed for the cost of travelling to and from official regional business functions, such as council meetings, committee meetings (provided they are a member), training sessions, etc.. We do not think it is necessary, however, for regional councillors to be reimbursed for travel costs related to other activities that, while they may relate to their duties and responsibilities as regional councillors, do not constitute official regional business (e.g., attending community events, meeting with constituents). We recommend:

That councillors be reimbursed for mileage for attending official regional functions only.

3.2 *Legal Costs*

In addition to these changes, we also believe that legal costs arising from or in any way related to complaints under the Code of Conduct should be deemed ineligible expenses. As we document in our *Fact Book*, Niagara Region is alone among regional governments in reimbursing such expenses. While some other Ontario municipalities do reimburse legal expenses related to Code of Conduct complaints, most do so *only if* the council member is found not to have been in violation of the Code of Conduct. We do not support such a policy for two reasons. First, as a practical matter, it does not offer much guidance to councillors in their decision on whether or not to retain legal counsel in the event of a complaint, since they cannot know in advance the outcome. Second, even in the unfortunate case of a wholly vexatious or unfounded complaint, where a councillor feels highly confident of a decision in their favour, there ought to be little reason to seek legal advice; the integrity commissioner process in Ontario is designed precisely to avoid making such expenses necessary. Finally, as we explain in greater detail below, we are optimistic that the culture of the current council will be significantly improved from that of 2014-2018, and that councillors need not be as concerned about protecting themselves from vexatious or politically motivated complaints. We therefore recommend:

That legal expenses arising from or in any way related to complaints under the Code of Conduct be deemed ineligible expenses.

3.3 *Role of Staff*

We were also asked to review the role of regional staff in administering the councillor expense policy. The current Councillors Expense Policy By-law specifies the following role for staff

5.2. Regional Administrative Staff

- a) Ensure consistent application of this policy;

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- b) Process expenses in accordance with this policy;
- c) Ensure the supporting documentation is in place and that expenditures conform to this policy;
- d) Advise Members if any submitted or proposed expenditure is an Ineligible Expense or a breach of this policy;
- e) Track actual expenses against approved budget; and
- f) Each year, incorporate budget dollars in the annual budget for Council to consider for funding or reimbursing Members' Eligible Expenses
- g) Complete the yearly Councillor Remuneration Report as required by the Act

Based on our consultations and investigations, there appears little reason to change or modify the role of staff in a significant way. We do think it is important, however, that staff not be placed in the difficult position of determining whether or not a particular expense claim is eligible. We therefore recommend:

That staff be required to forward any expense claims that do not clearly conform to the expense policy to the Audit Committee.

As per the terms of the current regional council expense policy, it would then be the responsibility of the Audit Committee to review the claim, and provide a recommendation to Council, who makes the final decision.

Finally, to enhance transparency and accountability, we also recommend:

That staff publish the councillor expenses quarterly disclosures on the Niagara Regional Council webpage.

4. NON-FINANCIAL RESOURCES FOR COUNCILLORS

Our investigations concerning non-financial resources for councillors centred on the suitability of the existing office and lounge space for regional councillors, and the adequacy of the administrative support provided to them. Through our consultative process, we learned that administrative support for councillors is provided largely through the Clerk's Office. There, staff provide administrative assistance to councillors as required and respond to their inquiries either directly, or by steering them to the appropriate department. As we outlined in our *Fact Book*, an alternative arrangement can be found in Waterloo Region, where councillors share one full-administrative assistant.

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Among the outgoing and returning councillors that we interviewed, the overwhelming consensus was that the existing administrative resources for regional councillors were more than adequate. Most saw little to no advantage in having a full-time administrative assistant dedicated to regional councillors over the current arrangement, and many wondered how such a person's time could be evenly (or fairly) divided among 31 councillors.

Similarly, our consultations revealed that the existing office and meeting space for councillors was generally considered to be adequate. While most councillors use the space to collect mail and occasionally meet with other councillors around council and committee meetings, some councillors—generally those living in closer proximity to regional headquarters—did use the space to meet with citizens.

Our recommendation is that:

No changes should be made to the existing non-financial resources for regional councillors.

5. CODE OF CONDUCT

Under Ontario's Municipal Act, each municipal integrity commissioner is responsible, among other things, for receiving complaints about violations of the municipality's Code of Conduct. In our *Fact Book* dated 30 September 2018, we wrote the following:

In his recent annual report, Niagara's Integrity Commissioner outlined his activities over the preceding year. Unfortunately, his annual report contains no links to his reports on individual incidents, nor does Integrity Commissioner's webpage on the Region's website. We discovered some of these individual reports in the Agendas of regional council meetings only with the help of reports in the *St. Catharine's Standard* that were found through Google.

In order for regional councillors and the general public to have a better idea of how Niagara's Code of Conduct has been interpreted, our first recommendation is that:

The Region's website contain separate pages for the Integrity Commissioner which will contain links not only to the Code of Conduct and to complaints procedures but also to the various annual reports of the integrity commissioner and to his/her reports relating to particular complaints over a significant period of time, five years perhaps.

A possible model for such webpages can be found on the website of the Regional Municipality of York at: https://www.vaughan.ca/cityhall/integrity_commissioner/Pages/default.aspx

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From our own investigations and from our consultative process we have determined that there are two related problems concerning Niagara Region's Code of Conduct.

1. The content of the Code itself, especially the extent to which it purports to govern all aspects of regional councillors' lives or whether it relates only to their actions "in an official capacity".
2. The Code has been "weaponized" in the sense that citizens and councillors with different political views from particular councillors appear to complain too frequently to the Integrity Commissioner as a way of discrediting their political opponents.

It is our view that changing the content of the Code cannot prevent its weaponization. The Code can only be effective if it is used carefully and for the purposes for which it was intended. In our view this means that complaints by one councillor against another should be made only in the most egregious of circumstances (e.g., if a councillor received hateful personal insults or threats from a council colleague).

On the basis of our consultations, we are optimistic that the culture of the current council will be significantly improved from that of the 2014-18 council. We sensed a desire from newly-elected councillors not to continue old political battles involving the Code and its weaponization.

Regardless of future patterns of councillor behaviour, Niagara Region needs a Code of Conduct. The current one³ is clearly outdated in that it makes no reference to the role of the Integrity Commissioner. It states instead that "Members of Council are encouraged to discuss any situations of concern or doubt regarding the code with the Regional Chair." The role of the Integrity Commissioner is, however, briefly referred to on the Region's webpage relating to "Complaint Process for Council Code of Conduct".⁴

In 2017 Regional Council hired a well-respected municipal lawyer, John Mascarin, to advise the Council's Procedural Bylaw Review Committee on the preparation of a new Code of Conduct. His advice and draft code can be found on pp.5-27 of the committee's agenda for 16 May 2017.⁵ The Committee substantially amended the draft code before presenting it to council.⁶ The most significant amendments related to insuring that the code only applied to members when they were acting "in their official capacities". After a long debate on 14 December 2017, Regional Council rejected the amended version, meaning that nothing resulted from the Mascarin draft.

On the basis of our consultations, we are convinced that many, perhaps most, of the current council would adopt Mr. Mascarin's proposed Code of Conduct. These councillors generally see

³ <https://www.niagararegion.ca/government/council/code-of-conduct/code-of-conduct.pdf>

⁴ <https://www.niagararegion.ca/government/council/code-of-conduct/submit-complaint.aspx>

⁵ www.niagararegion.ca/council/Council%20Documents/2017/PBLRC-agenda-may-16-2017.pdf

⁶ For the amended document, see: <https://www.niagararegion.ca/council/Council%20Documents/2017/COTW-agenda-dec-14-2017.pdf>

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no reason to restrict the code's applicability to their actions "in their official capacities". Nobody seemed much interest in reviving old debates about exactly what may or may not be involved in their "official capacity. Like us, most of our interviewees had faith that no integrity commissioner would attempt to bring the Region's Code of Conduct into their private lives at home or into their activities as an entrepreneur or employee, unless their behaviour in these settings was so public and objectionable as to bring the Region into serious disrepute.

Having faith that the Region would engage reasonable and sensible integrity commissioners, we recommend that:

Regional Council adopt the Code of Conduct proposed by Mr. John Mascarin in May 2017 that can be found on pp.20-27 of the document that is referenced in footnote 3 above.

6. A "REVIEW FRAMEWORK" FOR REGIONAL COUNCIL

The final phase of our Work Plan required that we "analyze the options and make recommendations concerning a 'review framework' for Regional Council to consider concerning the determination of the number of members of its council that will represent each lower-tier municipality after the municipal election of 2022."

In our *Fact Book* we stated the following:

In 2017 Regional Council added an additional seat for West Lincoln in accordance Sections 218 and 219 of the Ontario Municipal Act. Although this action has helped equalize representation for the less populous area municipalities in Niagara, it has exacerbated the obvious under-representation of the more populous, especially Niagara Falls and St. Catharines. Because Niagara made a change to its council composition during the period 2014-18 and because of the provisions of Section 218 (11) of the Ontario Municipal Act, the Niagara Regional Council is not obliged to review its representation system until after the municipal election of 2026. If Regional Council does not affirm or amend its representation system between 2018 and 2028, the Minister of Municipal Affairs may make a regulation under subsection (7) to change the representation of one or more area municipalities. Subsection (10) states that "When considering whether to make a regulation under subsection (7), the Minister shall, in addition to anything else the Minister wishes to consider, have regard to the principle of representation by population." A lot can change between now and 2028. However, even if subsection (10) did not exist, there is much to be said for the argument that representation on regional councils, including Niagara's, should adhere more closely to

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the principle of representation by population. In this regard, Halton Region after 2018 can serve as a model.

The paragraph quoted above was designed to show that, because the Niagara Regional Council *did* change its composition for the 2018 municipal elections, it was *not* obliged to review its representational system prior to 2026. Our conclusion on this matter seemed to differ from that of the Regional CAO at the time, with whom we had briefly discussed this matter as we developed our *Work Plan*. As indicated above, however, we still believe that Regional Council, as a matter of principle, should do all it can to ensure that all Niagara Region residents are represented equally on its council.

In our *Fact Book* we presented data about the representational system in Ontario's other regional municipalities and suggested that one way by which the size of Niagara's regional council could be reduced while simultaneously adhering more closely to the principle of representation by population would be to adopt a system of weighted voting for members of regional council, a mechanism provided for in Section 218 (3) of the Municipal Act. We described how this system works for the county council in Simcoe.

6.1 Consultations

During our consultations, there were very few respondents who were interested in discussing the principle of representation by population in general and weighted voting in particular. Instead, many councillors told us they believed this part of our mandate was largely irrelevant because they expected the new provincial government to take more drastic action to change the nature of regional government in Niagara. This possibility will be addressed in the next section of this report.

A significant number of people we consulted proposed that members of Niagara regional Council be elected from the four federal and provincial electoral districts that currently cover the entirety of Niagara's territory. With two councillors from each district, this would create a regional council having at least eight members. The proposal was obviously inspired by recent provincial legislation for the City of Toronto that created a 25-member council, the wards of which corresponded to Toronto's 25 federal and provincial electoral districts. We carefully considered this proposal but do not recommend its adoption for two main reasons.

1. If mayors were also on the regional council, they would outnumber the other elected members of the council. This is not a problem in itself, but the fact that there is such a variation in the populations of the lower-tier municipalities *is* a problem. We should be able to assume that the electoral districts have roughly equal populations. But the mayors certainly do not represent municipalities of equal populations. The only way to fix this problem would be to introduce weighted voting for the mayors. It would be possible, of course, *not* to include mayors on the regional council. Such an arrangement existed for

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the two-tier Corporation of Greater Winnipeg (1961-71) and the Regional Municipality of Ottawa-Carleton (1994-2000). In both cases, severe conflict broke out between the two tiers, leading to provincial legislation for complete amalgamation. We would never recommend the establishment of an upper-tier regional council without membership from the lower-tier mayors.

2. A more serious problem is that there will be another federal redistribution of electoral districts following the 2021 federal census and there is no guarantee that the federal Electoral Boundaries commission for Ontario will not create an electoral district in western Niagara that might also include Haldimand County and/or parts of the City of Hamilton. Many will remember that, prior to the 2013 federal redistribution, there was a federal and provincial electoral district called Niagara West—Glanbrook. A similar electoral district might have to be created again, depending on 2021 population figures for Niagara, the City of Hamilton, and Haldimand. Because the City of Toronto is about six times more populous than the Region of Niagara, the creation of a reconfigured electoral district crossing Niagara's borders is much more likely than the creation of an electoral district crossing the boundaries of the City of Toronto. The creation of such a cross-border electoral district in Niagara would mean that Niagara could not use the federal and provincial electoral districts in the 2026 municipal election and would therefore have to devise some other representational system following the 2022 municipal election.

6.2 *The Province's Regional Government Review*

On 15 January 2019 the provincial government announced that it had appointed two special advisors to assist in a "Regional Government Review". (For details, see <https://www.ontario.ca/page/regional-government-review#tor>.) The mandate of the advisors is to:

...is to provide expert advice to the Minister of Municipal Affairs and Housing and to make recommendations to the government on opportunities to improve regional governance and service delivery.

Recommendations from the advisory body will focus on the following questions:

Questions on municipal governance and decision-making;

- a. Is the decision-making (mechanisms and priorities) of upper- and lower-tier municipalities efficiently aligned?
- b. Does the existing model support the capacity of the municipalities to make decisions efficiently?
- c. Are two-tier structures appropriate for all of these municipalities?
- d. Does the distribution of councillors represent the residents well?

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- e. Do the ways that regional councillors/heads of council get elected/appointed to serve on regional council help to align lower- and upper-tier priorities?

Questions on municipal service delivery;

- f. Is there opportunity for more efficient allocation of various service responsibilities?
- g. Is there duplication of activities?
- h. Are there opportunities for cost savings?
- i. Are there barriers to making effective and responsive infrastructure and service delivery decisions?

This mandate clearly overlaps with the subject matter of this, our *Third Report*.

6.3 Recommendations

When our *Work Plan* was formulated, we were under the impression that recent amendments to the *Municipal Act* would require Niagara Region to review its representational system prior to the municipal election of 2022. As indicated in the introductory paragraphs of this section, we quickly realized that this was not the case, because the addition of one representative for West Lincoln in 2018 meant that Niagara would not need a representational review until prior to the 2026 election. Nevertheless, we believe that there are serious problems with current arrangements. As indicated in our *Fact Book*, Niagara Falls and, to a somewhat lesser extent, St. Catharines are grossly under-represented on regional council in relation to the principle of representation by population.

We have already noted that weighted voting on regional council attracted little support during our consultations. Nevertheless, we believe that, in the context of the provincial Regional Government Review, it should be revisited. In the Table below, we present a revised version of the weighted-voting plan we presented in our *Fact Book*. This revised plan adheres even more closely to the principle of representation by population. More importantly, in the context of the province's apparent desire to reduce the total number of municipal politicians, this plan reduces the size of the Niagara Regional Council (excluding the Chair) from 31 to 25. Some may see such a reduction as relatively insignificant in the overall scheme of things, but it is an action that can be taken in Niagara without any additional provincial legislation and without affecting any current municipal boundaries. It would also show that Niagara is willing to adopt innovative solutions not previously adopted by any other Ontario regional government.

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Lower-tier municipality	Population (2016 Census)	Share of regional population (%)	Number of regional councillors	Number of regional votes	Share of regional votes (%)	Number of residents per regional vote	Relationship to regional average
Fort Erie	30,710	6.9	2	2	5.6	15,355	+23.4
Grimsby	27,314	6.1	2	2	5.6	13,657	+9.8
Lincoln	23,787	5.3	2	2	5.6	11,894	-4.4
Niagara Falls	88,071	19.7	3	3x2=6	16.7	14,679	+18.0
Niagara-on-the-Lake	17,511	3.9	2	2	5.6	8,756	-29.6
Pelham	17,110	3.8	2	2	5.6	8,555	-31.2
Port Colborne	18,306	4.1	2	2	5.6	9,153	-26.4
St. Catharines	133,113	29.7	3	3x3=9	25	14,790	+18.9
Thorold	18,801	4.2	2	2	5.6	9,401	-24.4
Wainfleet	6,372	1.4	1	1	2.8	6,372	-48.8
Welland	52,293	11.7	2	2x2=4	11.1	13,073	+5.1
West Lincoln	14,500	3.2	2	2	5.6	7,250	-41.7
TOTALS	447,888	100	25	36	100.4	12,441	--

We recommend:

That, in accordance with Sections 218 and 219 of the Ontario Municipal Act and with the approval of the majority of its constituent municipalities, representing a majority of the Region's electors, Niagara Regional Council reduce its membership (excluding the Regional Chair) from 31 to 25 and enact a system of weighted voting as illustrated in the Table above for the municipal election of 2022.

We fully recognize that, as a result of the provincial Regional Government Review, municipal arrangements in Niagara might be so different in 2022 so as to make irrelevant the changes we are recommending. We believe, however, that regardless of the structural preferences of the Region's constituent municipalities and/or the provincial government, Regional Council should itself take action so as to indicate its openness to change and innovation. In the event that the Regional Government Review does not lead to structural changes in Niagara, we are convinced that the representational system we propose for 2022 is considerably superior to what is now in place.

MEMORANDUM

COTW-C 05-2019

Subject: Next Steps – “Final Report” Niagara Region Independent External Governance Auditor

Date: April 11, 2019

To: Regional Council

From: Ann-Marie Norio, Regional Clerk

The “Final Report” of the Niagara Region Independent External Governance Auditor includes recommendations for processes that directly impact Councillors.

In order to ensure fulsome review of these items, including potential budget implications, staff are recommending that these topics be brought before Council in report format to allow for an in-depth examination of the topics.

Council Remuneration

Council will recall that this topic was being held in abeyance pending Council's receipt of the Independent External Governance Auditor report. As there are budget implications with decisions related to this, staff are committed to bringing a report on the topic of Councillor remuneration to the Corporate Services Committee meeting being held on May 8, 2019.

Council Expenses

Council has a number of options with respect to its expense policy as outlined by Drs. Sancton and Cobban. In order to ensure processes are reasonable and can be undertaken by staff, a report outlining options and alternatives can be prepared for Council's consideration.

Code of Conduct

Correspondence Item COTW-C 06-2019 Appendix 1 includes the draft Code of Conduct presented to the Procedural By-law Review Committee in May 2017. Should Council wish to consider adoption of this Code, it will need to be reviewed to ensure compliance with current legislation.

Respectfully submitted and signed by

Ann-Marie Norio
Regional Clerk

Appendix A

Code of Conduct

REGIONAL MUNICIPALITY OF NIAGARA
CODE OF CONDUCT FOR MEMBERS OF COUNCIL
[MAY, 2017]

1.0 Application

1.1 This Code of Conduct applies to Members of the Council of Niagara Region, including the Regional Chair.

1.2 The purpose of this Code of Conduct is to establish a general standard to provide a common basis for the acceptable conduct of Members and to which all Members are expected to adhere to and comply with. This Code of Conduct augments other laws which Members are governed by and which requires Members to follow the Procedural By-law and other sources of applicable law, including but not limited to:

- *Municipal Act, 2001*
- *Municipal Conflict of Interest Act*
- *Municipal Elections Act, 1996*
- *Municipal Freedom of Information and Protection of Privacy Act*
- *Human Rights Code*
- *Occupational Health and Safety Act*
- *Provincial Offences Act*
- *Criminal Code*

2.0 Statement of Principles

2.1 This Code of Conduct is intended to set a high standard of conduct for Members in order to provide good governance and a high level of public confidence in the administration of the Region by its Members as duly elected public representatives to ensure that they each operate from a foundation of integrity, justice, truth, honesty and courtesy.

2.2 The following key statements of principle are intended to guide Members and assist with the interpretation of the Code of Conduct:

- Members shall serve the public in a conscientious and diligent manner;
- Members shall observe and act with the highest standard of ethical conduct and integrity;
- Members shall avoid the improper use of the influence of their office and act without self-interest;

- Members shall act and are expected to perform their functions with honesty, integrity, accountability and transparency;
- Members shall perform their duties and arrange their private affairs in a manner that promotes public confidence and that will bear public scrutiny;
- Members shall be cognizant that they are at all times representatives of the Region and of Council, recognize the importance of their duties and responsibilities, take into account the public character of their function, and always maintain and promote the public trust in the Region; and
- Members will uphold the letter of the laws of Canada, Ontario and the laws and policies adopted by Council from time to time.

3.0 Definitions

3.1 The following terms shall have the following meanings in this Code of Conduct:

- (a) “CAO” means the Chief Administrative Officer of the Region;
- (b) “child” means a child born within or outside marriage and includes an adopted child and a person whom a parent has demonstrated a settled intention to treat as a child of his or her family;
- (c) “Chair” means the Regional Chair;
- (d) “confidential information” means information or records that are in the possession, in the custody or under the control of the Region that the Region is either precluded from disclosing under the *Municipal Act, 2001* or other applicable legislation, its Procedural By-law or any of its other by-laws, policies, rules or procedures, or that it is required to refuse to disclose under the *Municipal Freedom of Information and Protection of Privacy Act* or other legislation;
- (e) “conflict of interest” means a situation in which a Member has competing interests or loyalties between the Member’s personal or private interests and his or her public interests as an elected representative such that it might influence his or her decision in a particular a matter;
- (f) “Council” means the Regional Council for Niagara Region;
- (f) “fiduciary” means the obligation of a person in a position of authority to act on behalf of another, assuming a duty to act in good faith and with care, candour and loyalty in fulfilling this obligation;
- (g) “frivolous” means something that is not worthy of serious consideration, or that is of little or no importance, due to its lack of seriousness or sense;
- (h) “Member” means a Member of the Council for the Region;

- D**
- R**
- A**
- (i) “non-pecuniary interest” means a private or personal interest that a Member may have that is non-financial in nature and that would be considered by a reasonable person, apprised of all the circumstances, as being likely to influence the Member’s decision in any matter in which the non-pecuniary interest arises, and may include, but is not limited to, an interest that arises from a relationship with a person or entity;
 - (j) “parent” means a person who has demonstrated a settled intention to treat a child as a member of his or her family whether or not that person is the natural parent of the child;
 - (k) “Region” means the Regional Municipality of Niagara;
 - (l) “spouse” means a person to whom the person is married or with whom the person is living in a conjugal relationship outside marriage;
 - (m) “staff” means the CAO and all commissioners, officers, directors, managers, supervisors and all non-union and union staff, whether full-time, part-time, contract, seasonal or volunteer, as well as agents and consultants acting in furtherance of the Region’s business and interest;
 - (m) “vexatious” means something that is instituted without sufficient grounds and serving only to cause annoyance, frustration or worry.

4.0 Responsibilities of Council

- F**
- 4.1 Council is responsible for and dedicated to providing good and effective government for the public in the Region in an open, accountable and transparent manner.
- 4.2 A fiduciary relationship exists between the Council and residents of the Region.

5.0 General Obligations

- T**
- 5.1 In carrying out their duties, Members shall:
- (a) make every effort to act with good faith and care;
 - (b) conduct themselves with integrity, courtesy and respectability at all meetings of the Council or any committee and in accordance with the Region’s Procedural By-law or other applicable procedural rules and policies;
 - (c) seek to advance the public interest with honesty;
 - (d) respect the individual rights, values, beliefs and personality traits of any other person and refrain from imposing their own personal moral and religious beliefs on others;
 - (e) refrain from making statements known to be false or with the intent to mislead Council or the public;

- (f) accurately communicate the decisions of Council and respect Council's decision-making process even if they disagree with Council's ultimate determinations and rulings; and
- (g) refrain from making disparaging comments about another Member or unfounded and speculative accusations about the motives of another Member.

6.0 The Role of Staff

6.1 Council as a whole approves the budget, policies and governance of the Region through its by-laws and resolutions. Individual Members do not direct or oversee the functions of the staff of the Region.

6.2 The Region's staff serve Council and work for the Region as a body corporate under the direction of the CAO. Inquiries of staff from Members should be directed to the CAO or to the appropriate senior staff as directed by the CAO. Members shall not publicly criticize staff. Should a Member have any issue with respect to staff such issue shall be referred to the CAO who will direct the matter to the particular staff member's appropriate superior.

6.3 Members shall respect the role of staff in the administration of the business affairs of the Region. Members shall respect that staff:

- (a) provide advice and make policy recommendations in accordance with their professional ethics, expertise and obligations and that Members must not falsely or maliciously injure the reputation of staff members whether professional or ethical or otherwise;
- (b) work within the administration of justice and Members must not make requests, statements or take actions which may be construed as an attempt to influence the independent administration of justice and, therefore, Members shall not attempt to intimidate, threaten, or influence any staff member from carrying out that person's duties, including any duty to disclose improper activity; and
- (c) carry out their duties based on political neutrality and without undue influence from any individual Member and, therefore, Members must not invite or pressure any member of staff to engage in partisan political activities or be subjected to discrimination or reprisal for refusing to engage in such activities.

7.0 Regional Property

7.1 Council is the custodian of the assets of the Region. The community places its trust in Council and those it appoints to make decisions for the public good in relation to these assets.

7.2 By virtue of their office or appointment, Members must not use or permit the use of the Region's land, facilities, equipment, supplies, services, staff or other resources for activities other than the business of the Region. No Member shall seek financial

gain for themselves, family or friends from the use or sale of Region-owned intellectual property, computer programs, technological innovations, or other patent, trademarks or copyright held by the Region.

8.0 Gifts and Benefits

8.1 Gifts to Members risk the appearance of improper influence. Gifts may improperly induce influence or create an incentive for Members to make decisions on the basis of relationships rather than in the best interests of the Region. A Member shall not accept a fee, advance, gift, gift certificate, cash, hospitality or any form of personal benefit connected directly or indirectly with the performance of his or her duties. A gift, benefit or hospitality provided with the Member's knowledge to a Member's spouse, child, or parent, or to a Member's staff that is connected directly or indirectly to the performance of the Member's duties is deemed to be a gift to that Member. Any doubt concerning the propriety of the gift should be resolved by the Member not accepting or keeping it.

8.2 For greater clarity, Members shall not accept any gift or benefits in their public capacity other than in the following circumstances:

- (a) compensation authorized by law;
- (b) such gifts or benefits that normally accompany the responsibilities of office and are received as an incident of protocol or social obligation;
- (c) a political contribution otherwise reported by law, in the case of Members running for office;
- (d) services provided without compensation by persons volunteering their time;
- (e) a suitable token, memento or souvenir received as an incident of protocol or social obligation that normally accompanies the responsibilities of elected office or at a function honouring the Member;
- (f) food, lodging, transportation and entertainment provided by provincial, regional and local governments or any agencies or subdivisions of them or by the federal government or by a foreign government within a foreign country, or by a conference, seminar or event organizer where the Member is either speaking or attending in an official capacity;
- (g) food and beverages consumed at banquets, receptions or similar events, if:
 - (i) attendance serves a legitimate purpose related to the normal business of the Region,
 - (ii) the person extending the invitation or a representative of the organization is in attendance, and
 - (iii) the value is reasonable and the invitations are infrequent;

- (h) gifts of nominal value (for example, a baseball cap, t-shirt, flash drive, book, etc.); and
- (i) any gift or benefit, if the Integrity Commissioner is of the opinion, before the gift or personal benefit has been accepted, that it is unlikely that receipt of the gift or benefit gives rise to a reasonable presumption that the gift or benefit was given in order to influence the Member in the performance of his or her duties.

9.0 Confidentiality

- 9.1 Members receive confidential information from a number of sources as part of their work as elected officials. This includes information received in confidence by the Region that falls under the privacy provisions of the *Municipal Freedom of Information and Protection of Privacy Act* and other applicable privacy laws and information received during closed meetings of Council. Members shall comply with the Region's "Information Access and Privacy Protection Policy".
- 9.2 A Member shall not disclose the content of any confidential information, or the substance of deliberations, of a closed meeting and the Member has a duty to hold any information received at closed meetings in strict confidence for as long and as broadly as the confidence applies. A Member shall not, either directly or indirectly, release, make public or in any way divulge any such information or any confidential aspect of the closed deliberations to anyone, unless authorized by Council or as required by law.
- 9.3 A Member shall not disclose, use or release confidential information in contravention of applicable privacy laws. Members are only entitled to information in the possession of the Region that is relevant to matters before the Council, or a committee. Otherwise, Members enjoy the same access rights to information as any other member of the community or resident of the Region and must follow the same processes as any private citizen to obtain such information.
- 9.4 Members shall not release information subject to solicitor-client privilege, unless expressly authorized by Council or as required by law.
- 9.5 Members shall not misuse confidential information in any way or manner such that it may cause detriment to the Region, Council or any other person, or will benefit themselves or others.
- 9.6 Members shall respect the right to confidentiality and privacy of all clients, volunteers and staff, and should be aware of their responsibilities under applicable legislation, Regional policies, procedures and rules, ethical standards and, where appropriate, professional standards.

10.0 Discrimination and Harassment

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10.1 Members shall treat all members of the public, another Member and staff with respect and without abuse, bullying or intimidation and ensure that their work environment is free from discrimination and harassment.

10.2 Members shall not use indecent, abusive or insulting words, phrases or expressions toward any member of the public, another Member or staff. Members shall not make an expression in any manner that is discriminatory to any individual based on the individual's race, ancestry, place of origin, creed, gender, sexual orientation, age, colour, marital status or disability.

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11.0 Improper Use of Influence

11.1 Members shall not use the influence of their office or appointment for any purpose other than the exercise of his or her official duties in the public interest.

11.2 Members shall not use the status of their position to influence the decision of another person to the private advantage or non-pecuniary interest of themselves, their parents, children or grandchildren, spouse, or friends or associates, or for the purpose of creating a disadvantage to another person or for providing an advantage to themselves.

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11.3 Members who are asked to support charitable activities within the community may do so by accepting honorary roles, lending their names to organizations or events and encouraging public support of events. In doing so, Members shall ensure that they do not have a conflict between their private interest and their duties to the public. Members shall not directly solicit funds nor receive funds for charitable purposes in their role as a Member. Members shall remain at arms-length from financial aspects of external events which they support in their public capacity and shall not participate in decisions concerning the disbursement of funds or determining the beneficiaries of the funds.

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12.0 Conflicts of Interest

12.1 Members shall avoid conflicts of interest, both pecuniary and non-pecuniary. Members shall take proactive steps to mitigate conflicts of interest in order to maintain public confidence in the Region and its elected officials. Members are encouraged to seek guidance from the Integrity Commissioner when they become aware that they may have a conflict between their responsibilities to the public as a Member and any other interest, pecuniary or non-pecuniary.

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13.0 Council Policies and Procedures

13.1 Members shall strictly observe and adhere to the policies, procedures and rules established by Council.

14.0 Election Activity

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- 14.1 Members of Council are required to conduct themselves in accordance with the *Municipal Elections Act, 1996* and any Region policies. The use of the Region's resources, both property and staff time, for any election-related activity is strictly prohibited. Election-related activity applies to the Member's campaign and any other election campaigns for municipal, provincial or federal office.

15.0 Respect for the Code of Conduct

- 15.1 Members shall respect the process for complaints made under the Code of Conduct or through any process for complaints adopted by the Region. Members shall not act in reprisal or threaten reprisal against a person who makes a complaint or provides information to the Integrity Commissioner during an investigation. Members shall interact courteously and respectfully with the Integrity Commissioner and with any person acting under the direction of the Integrity Commissioner.

- 15.2 Members shall cooperate with requests for information during any investigations or inquiries under the Code. Members shall not destroy documents or erase electronic communications or refuse to respond to the Integrity Commissioner where a complaint has been lodged under the Code or any process for complaints adopted by the Region.

16.0 Penalties for Non-Compliance with the Code of Conduct

- 16.1 Where Council receives a report from the Integrity Commissioner that there has been a violation of the Code of Conduct by a Member, Council may impose the following penalties on the Member:

- (a) a reprimand; or
- (b) a suspension of the remuneration paid to the Member in respect of his or her services as a Member for a period up to 90 days.

- 16.2 Council may, on the basis of a recommendation from the Integrity Commissioner, also take any or all of the following actions in furtherance of a reprimand, and require that the Member:

- (a) provide a written or verbal apology;
- (b) return property or make reimbursement of its value or of money spent;
- (c) be removed from or not be appointed to the membership on a committee of Council;
- (d) be removed from or not be appointed as chair of a committee of Council.

17.0 Complaint Protocol

- 17.1 The Complaint Protocol – Code of Conduct is Appendix 1 to the Code of Conduct.

Minute Item No. 5.1
PW 18-2019
Winter Maintenance Extension

That Report PW 18-2019, dated April 16, 2019, respecting Winter Maintenance Extension, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the amending agreement option to extend the term of the Area Winter Maintenance Services Contract under 2008-RFP-40 for an additional one year term ending September 3, 2020, as outlined in Appendix 1 of Report PW 18-2019, **BE APPROVED**;
2. That an amending agreement with Steed and Evans Limited **BE PREPARED** by the Director of Legal and Court Services to exercise the final one year option and extend the contract end date to September 3, 2020, following Council approval; and
3. That the Chief Administrative Officer **BE AUTHORIZED** to execute the amending agreement with Steed and Evans Limited.

Minute Item No. 5.2
PW 24-2019
Transportation Infrastructure Means Protection Update

That Report PW 24-2019, dated April 16, 2019, respecting Transportation Infrastructure Means Protection Update, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the recommendations contained in the Transportation Infrastructure Means Protection report, attached as Appendix 2 to Report PW 24-2019, **BE ENDORSED**;
2. That staff **BE DIRECTED** to proceed with the detailed design and tendering of the Transportation Infrastructure Means Protection project; and
3. That financing in the amount of \$4,000,000 gross and net **BE INITIATED** from the approved 2019 capital budget for the Transportation Infrastructure Means Protection project and that the project **BE FUNDED** as follows:
 - Reserves – Capital Levy - \$4,000,000

Minute Item No. 9.1
Confidential Verbal Update
A Matter of Litigation or Potential Litigation - Emterra Contract

That the Confidential Verbal Update regarding a Matter of Litigation or Potential Litigation – Emterra Contract, **BE RECEIVED** for information.

**THE REGIONAL MUNICIPALITY OF NIAGARA
PUBLIC WORKS COMMITTEE
MINUTES**

**PWC 4-2019
Tuesday, April 16, 2019
Council Chamber
Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON**

Committee: Bradley (Regional Chair), Chiocchio, Diodati, Edgar (Committee Vice-Chair), Fertich, Foster, Gale, Heit, Insinna, Nicholson, Rigby (Committee Chair), Sendzik, Steele, Ugolini, Witteveen

Absent/Regrets: Disero, Junkin, Zalepa

Other Councillors: Ip

Staff: D. Ane, Manager, Program Financial Support, D. Gibbs, Director, Legal & Court Services, J. Gilston, Legislative Coordinator, C. Habermehl, Acting Commissioner, Public Works, T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, Dr. M. Hirji, Acting Medical Officer of Health, M. Janas, Associate Director, Water Operations Maintenance, M. Robinson, Director, GO Implementation Office, C. Ryall, Director, Transportation Services, S. Tait, Program Manager, Waste Management Services, F. Tassone, Associate Director, Transportation Engineering, M. Trennum, Deputy Regional Clerk, R. Tripp, Acting Chief Administrative Officer, A. Tyldesley, Associate Director, Waste Collection and Diversion

1. CALL TO ORDER

Committee Chair Rigby called the meeting to order at 9:31 a.m.

2. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

3. PRESENTATIONS

3.1 Quality of Drinking Water

Committee Chair Rigby advised that the delegation on the Quality of Drinking Water had withdrawn their request to appear before Committee.

3.2 Reducing Litter and Waste in Our Communities: Discussion Paper

Jennifer Mazurek, Waste Management Program Manager, Public Works, provided information respecting Reducing Litter and Waste in Our Communities: Discussion Paper. Topics of the presentation included:

- A Made-in-Ontario Environment Plan
- Prevent and Reduce Litter in Neighbourhoods and Parks
- Increase Opportunities for Ontarians to Reduce Waste
- Make Producers Responsible for their Waste
- Reduce Food and Organic Waste
- Reduce Plastic Waste Going into Landfills or Waterways
- Provide Clear Rules for Compostables
- Recover the Value of Resources
- Support Competitive and Sustainable End-Markets

A copy of the presentation is attached to these minutes.

4. **DELEGATIONS**

4.1 PW 24-2019 Transportation Infrastructure Means Protection Update (Agenda Item 5.2)

Committee Chair Rigby advised the delegation request was received after the deadline and would need to be considered by the Committee.

Moved by Councillor Witteveen
Seconded by Councillor Ugulini

That Stephanie Farquharson and Wendi Duggan, Niagara United, **BE PERMITTED** to appear before the Public Works Committee as a delegate respecting PW 24-2019, Transportation Infrastructure Means Protection Update (Agenda Item 5.2).

Carried

4.1.1 Stephanie Farquharson and Wendi Duggan, Niagara United

Stephanie Farquharson and Wendi Duggan, Niagara United, appeared before Committee in support of the recommendations of Report PW 24-2019.

The delegation's speaking notes are attached to these minutes as PWC-C 13-2019.

5. ITEMS FOR CONSIDERATION

5.1 PW 18-2019

Winter Maintenance Extension

Moved by Councillor Diodati

Seconded by Councillor Steele

That Report PW 18-2019, dated April 16, 2019, respecting Winter Maintenance Extension, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the amending agreement option to extend the term of the Area Winter Maintenance Services Contract under 2008-RFP-40 for an additional one year term ending September 3, 2020, as outlined in Appendix 1 of Report PW 18-2019, **BE APPROVED**;
2. That an amending agreement with Steed and Evans Limited **BE PREPARED** by the Director of Legal and Court Services to exercise the one year option and extend the contract end date to September 3, 2020, following Council approval; and
3. That the Chief Administrative Officer **BE AUTHORIZED** to execute the amending agreement with Steed and Evans Limited.

The following friendly **amendment** was accepted by the Committee Chair, and the mover and seconder of the motion:

2. That an amending agreement with Steed and Evans Limited **BE PREPARED** by the Director of Legal and Court Services to exercise the **final** one year option and extend the contract end date to September 3, 2020, following Council approval

That Committee Chair called the vote on the motion as amended, as follows:

That Report PW 18-2019, dated April 16, 2019, respecting Winter Maintenance Extension, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the amending agreement option to extend the term of the Area Winter Maintenance Services Contract under 2008-RFP-40 for an additional one year term ending September 3, 2020, as outlined in Appendix 1 of Report PW 18-2019, **BE APPROVED**;

2. That an amending agreement with Steed and Evans Limited **BE PREPARED** by the Director of Legal and Court Services to exercise the final one year option and extend the contract end date to September 3, 2020, following Council approval; and
3. That the Chief Administrative Officer **BE AUTHORIZED** to execute the amending agreement with Steed and Evans Limited.

Carried

5.2 PW 24-2019

Transportation Infrastructure Means Protection Update

Moved by Councillor Sendzik
Seconded by Councillor Ugulini

That Report PW 24-2019, dated April 16, 2019, respecting Transportation Infrastructure Means Protection Update, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the recommendations contained in the Transportation Infrastructure Means Protection report, attached as Appendix 2 to Report PW 24-2019, **BE ENDORSED**;
2. That staff **BE DIRECTED** to proceed with the detailed design and tendering of the Transportation Infrastructure Means Protection project; and
3. That financing in the amount of \$4,000,000 gross and net **BE INITIATED** from the approved 2019 capital budget for the Transportation Infrastructure Means Protection project and that the project **BE FUNDED** as follows:
 - Reserves – Capital Levy - \$4,000,000

Recorded Vote:

Yes (10): Chiocchio, Diodati, Edgar, Fertich, Foster, Nicholson, Sendzik, Steele, Ugulini, Witteveen.

No (4): Gale, Heit, Insinna, Rigby.

Carried

6. CONSENT ITEMS FOR INFORMATION

There were no consent items for information.

7. OTHER BUSINESS

7.1 Emterra Environmental Update

Councillor Nicholson requested staff arrange to have Emterra Environmental attend a future Council meeting to provide an update respecting waste collection.

8. CLOSED SESSION

Moved by Councillor Foster
Seconded by Councillor Insinna

That this Committee **DO NOW MOVE** into Closed Session for the purposes of receiving information of a confidential nature respecting:

Confidential Verbal Update – A Matter of Litigation or Potential Litigation –
Emterra Contract

Carried

Committee resolved into closed session at 11:48 a.m.

9. BUSINESS ARISING FROM CLOSED SESSION

Committee reconvened in open session at 12:21 p.m. with the following individuals in attendance:

Committee:	Bradley (Regional Chair), Chiocchio, Diodati, Edgar (Committee Vice-Chair), Fertich, Foster, Gale, Insinna, Nicholson, Rigby (Committee Chair), Steele, Ugulini, Witteveen
Absent/Regrets:	Disero, Heit, Junkin, Sendzik, Zalepa
Staff:	D. Ane, Manager, Program Financial Support, D. Gibbs, Director, Legal & Court Services, J. Gilston, Legislative Coordinator, C. Habermehl, Acting Commissioner, Public Works, T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, M. Trennum, Deputy Regional Clerk, S. Tait, Program Manager, Waste Management Services, R. Tripp, Acting Chief Administrative Officer, A. Tyldesley, Associate Director, Waste Collection and Diversion

9.1 Confidential Verbal Update

Confidential Verbal Update – A Matter of Litigation or Potential Litigation -
Emterra Contract

Moved by Councillor Gale
Seconded by Councillor Nicholson

That the Confidential Verbal Update regarding a Matter of Litigation or
Potential Litigation – Emterra Contract, **BE RECEIVED** for information.

Carried

10. **NEXT MEETING**

The next meeting will be held on Tuesday, May 7, 2019, at 9:30 a.m. in the
Council Chambers, Regional Headquarters.

11. **ADJOURNMENT**

There being no further business, the meeting adjourned at 12:22 p.m.

Councillor Rigby
Committee Chair

Jonathan Gilston
Legislative Coordinator

Ann-Marie Norio
Regional Clerk

Good morning and thank you for allowing me to be here with you all. My name is Wendi Duggan, this is Stephanie Farquharson and we are here representing Niagara United.

I'm sure at this point we can all agree that every time the Infrastructure and barriers are brought up it is countered with one of these three questions or comments...

1. The money would be better spent on mental health services than on barriers.
2. If you put up barriers, then "they" will just find somewhere else to go, what do we do, just put them on every [REDACTED]
3. All the talking about suicide is what's making people [REDACTED] there.

I know everyone here has most likely been on one side or the other where these three things have come up. So, let's talk about it, as talking about it is key.

Let's start with

1. The money would be better spent in mental health services than on barriers.

The truth is many individuals with mental illness are not affected by suicide and on the other side of it not all people who attempt or die by suicide have mental illness.

Niagara United fully agrees that better functioning services need to be available in Niagara, we are also very aware that services for Niagara adults hold a disturbing wait time when try to gain access to these services, which is another thing that we believe needs to be addressed sooner rather than later, but this is the wrong room for that discussion.

Niagara United will be advocating and pushing forward on ways to bridge gaps in these areas and continue to push for services needed or in need of extra help. But acknowledging these services are needed doesn't mean the need for barriers disappears, this isn't an either-or situation. Short-term and long-term solutions are necessary and required.

We also promised to come back with some numbers for you so let me break it down for you, I won't go through the whole thing again, but as it sits currently. If we take the mean total which again is the cost of death per suicide (direct cost + indirect cost per person) which we found out based on the 1996 New Brunswick Study was 849 thousand 877 dollars, add the current inflation of 48.83% which is set by the Bank of Canada bringing us to 1 million 264 thousand 873 dollars per suicide, now we take the cost per suicide and times it by the current suicides by [REDACTED] which is now 6, and that would give us a total of 7 million 589 thousand 238 dollars in 7 months. If we don't put barriers and if you allow this to continue at the same rate come October making it a full year, the total would be 13 million 10 thousand 112 dollars for the year.

Niagara United does understand that barriers and mental health services are not funded from the same place, since municipal government doesn't fund health care, but they do fund infrastructure. Meaning you can fund barriers, which the expert advised is needed and is the best solution for the infrastructure in question.

Number 2. If you put up barriers, then “they” will just find somewhere else to go, what do we do then, just put barriers up on every [REDACTED]

I would like to address the “they” people are referring to when saying this. Who are “they” you are speaking of? Those with suicidal thoughts? Or those who have mental health conditions? Because the facts on this state that people who suffer with suicidal thoughts do not necessarily have mental illness and those with mental illness do not always have suicide thoughts, on top of all of that people suffering from suicidal thoughts don’t want to die, they just want the unbearable pain to end.

I want to take a moment to read a letter sent to me yesterday about a “they”, a letter from a Dad & Mom named Jill and Tom about their “they” named Thomas James Ryan aka Jamie.

To: Wendi Duggan

In Regard To: [REDACTED] Suicide Prevention Barriers

We are writing this note to you; with the hope you can convey our views to Regional Councillors debating the value of suicide prevention [REDACTED] barriers at the [REDACTED]

We are Tom and Jill Ryan. On February 4th at 11:19 of this year our beautiful, beautiful son Jamie [REDACTED] to his death from the North West section of the [REDACTED]

We have read the article in the St. Catharines Standard regarding suicide prevention barriers.

We agree that the reasons NOT to put barriers up have validity.

However, despite this agreement, we feel very strongly that we as a community MUST install these barriers.

Our reasons are simple:

This [REDACTED] is very close to many, many of our community's most vulnerable people. Sadly, it has become the "face" of suicide in St. Catharines. It makes it too easy for suffering people to make a tragic impulse decision that can never be undone.

Our sons story illustrates this:

One of the symptoms of his disease was that he would often become overcome with a wave of depression and anxiety. He would go from functioning in a normal and often happy fashion, to overwhelming depression and anxiety. He would often say, "Dad, it's like a wave that comes over me and I just can't stop it".

On the day he died, he had a pretty normal day. In the evening he gamed online with old friends. We can confirm that at 10:00 p.m., less than 1 1/2 hour before his death, he had downloaded and installed a newly released video game.

Sometime after 10 pm, he experienced one of these waves of anxiety and depression.

Our son wanted so desperately to live but at this moment his pain became too much for him to bear.

At 10:20 pm he wrote a brief goodbye note.

The walk to the [REDACTED] is 25 minutes from where he lived.

At 11:19 pm, [REDACTED]. He was 27 years of age.

We know with virtual certainty that had there been suicide prevention barriers in place, he would not have [REDACTED] on that night. [REDACTED]

[REDACTED] [REDACTED] [REDACTED] [REDACTED]

We know that had this option not existed, he would have lived one more night. He would have lived to see one more morning.

At that point, maybe the new medication would start to work. Maybe the depression would pass, as it always eventually did in the past. Maybe some way, somehow, he would find a way to get the upper hand over this horrible disease.

We are not at all sure that [REDACTED].

However, we do know that had there been [REDACTED] barriers in place, our son would have had a chance to fight one more day. Another day that could have made a difference.

He deserved that chance.

Thank You,

Tom and Jill Ryan

His parents included an entry from Jamie's "Gratefulness List", written on Oct 15th, 2018:

"I'm grateful for walking, and for the messages on the [REDACTED]"

Bottom line....Barriers save lives, that is a proven statistic, they give people a chance to live, both above and below, and that's what prevention is.

I know to many it may sound ridiculous but our answer to what about barriers on other

[REDACTED] I can say with as much certainty as previous stated in council, if 6 people [REDACTED] from another infrastructure within 6 months in our region, Niagara United will be back, and we will be here fighting for barriers as a suicide prevention method just like we have for months now.

Comment response 3 - All the talking about suicide is what's making people ■■■ there!

This statement carries with it so much stigma that it needs to be addressed. Talking about suicide doesn't make people get up and die by suicide. Talking about suicide, making it part of conversations, allowing for it to be a topic in a room without it bringing about shame, or embarrassment but rather bring connection, and effective communication about a topic that needs to be heard and spoke about so those who suffer do not have to suffer with those feelings alone or in silence.

Talking about it in media relations is a whole different story. Scientific evidence has shown that media coverage of suicide can sometimes result in contagion in some vulnerable people leading to increased suicide rates. For this reason, there are guidelines set up, things like the use of appropriate language, that efforts be made to reduce stigma around mental disorders, and to provide information about alternatives to suicide.

Understanding the difference in talking about suicide is important. Dr Sinyor lead author of the guidelines and psychiatrist at Sunnybrook Health Sciences Centre in Toronto says "This is an extremely important issue. Some reports can be harmful, but we also know that sending appropriate, contextualized messages about suicide and mental health in general can save lives".

Now I've talked about all the questions and comments most frequently said, except for this last one that started to be more of a reason since our last visit here this past January. The concern for driving under said Infrastructure has become a grave concern for many, many people in our region. Many are scared to drive over in fear of witnessing a suicide, as some have had just that happen, and others are taking alternate routes to avoid going under the infrastructure all together. This fear is not okay.

Dan and Nicole whom are here today are parents of Amelia. Amelia died by suicide at this Infrastructure on February 18th 2019. Her parents are not sure the barriers would have stopped their daughter, as she is remembered as a determined and motivated young lady, but Dan has said that he is thankful that her ■■■ did not cause any havoc below, for that he is thankful. He says that he would hate to think of what could have happened. And for that reason alone, thinks the barriers should be installed.

Alexus Howard was a witness to the ■■■ on the 4th of February. Alexis said in a note written for today that the traumatizing effect this has had on her has greatly impacted her life as well as the other individuals as well. Being witness to such an event has left her with feelings of helpless and an alone feeling. Her heart was and is broken at the thought that Jill and Tom's son Jamie won't be going home.

The real issue here is that people in general and some elected officials in particular are disregarding reliable evidence and expertise about suicide prevention in favor of hunches and uninformed reasoning.

It's also kind of scary to think a reason for not implementing a best practice solution is because we might then be asked to do it again.

Reducing Litter and Waste in Our Communities: Discussion Paper

Public Work Committee

April 16, 2019

Niagara Region

A Made-in-Ontario Environment Plan

- A Made-in-Ontario Environment Plan was released on November 29, 2018 with a 60 day review period
- Niagara Region's response incorporated input from Planning and Development Services, Public Works, Public Health and Emergency Services, and some Local Area Municipalities
- The plan focused on:
 - Protecting our Air, Lakes and Rivers
 - Addressing Climate Change
 - Reducing Litter and Waste in Our Communities & Keeping Our Land and Soil Clean
 - Conserving Land and Greenspace

Niagara Region

Reducing Litter and Waste in Our Communities: Discussion Paper

- Delivering on the Made-in-Ontario Environment Plan
- Offers commitments aimed at reducing litter and waste including:
 - Reducing and diverting food and organic waste from households and businesses
 - Reducing plastic waste
 - Reducing litter in our neighbourhoods and parks
 - Increasing opportunities for the people of Ontario to participate in waste reduction efforts
- The paper asks a number of questions for which Waste Management staff have coordinated a response

Section 2.1 Prevent and Reduce Litter in Neighbourhoods and Parks

- Partner with local organizations and LAMs
- Anti-litter campaign
- Hotspots
 - Highway on/off ramps and medians
 - Cigarette butts in parking areas and spaces around public buildings
 - Subdivision streets that act as wind tunnels
 - Hydro corridors with fencing
 - School yards
- Problematic materials
 - Coffee cups
 - Cigarette butts
 - Fast food packaging
 - Syringes

Section 2.2 Increase Opportunities for Ontarians to Reduce Waste

- Extend producer responsibility to all sectors including Multi-Residential and ICI with mandatory diversion programs
- Consistent approach for materials accepted in the Blue Box Program, as part of change over to producer responsibility
- Broadening the list of obligated materials and designating all packaging
- Support RPWCO's position to streamline processes for data collection
- Provincial textile diversion program

Section 2.3 Make Producers Responsible for their Waste

- Previous support for producer responsibility continues to apply
- Transition must address municipal contract implications, assets, service standards, roles, funding, etc.
- Consumer convenience should be maintained or improved, and access to existing services should not be negatively impacted
- Designated materials should be banned from disposal after waste diversion plans are in place and when a viable alternative to disposal exists
- List of obligated materials should be expanded

Section 2.4 Reduce Food and Organic Waste

- There is a need to involve experts in development of food safety guidelines to support safe donation
- Preferred focus is on prevention of waste
- The ICI sector could potentially achieve better diversion rates through policies that reduce risk to retailers donating food and incentives to reduce food waste at the producer/retail level
- Bans are supported and program should be expanded to include compostable packaging and other materials
- Targets and planning considerations

Section 2.5 Reduce Plastic Waste Going into Landfills or Waterways

- Focus on reduction and reuse
- Eliminate the use of problematic products and packaging (e.g. micro-plastics),
- Reduce consumer and industrial use of single-use plastics and promote design for the environment
- Shift to full producer responsibility and set targets for packaging including plastic
- Support public education and programs to encourage choosing reusable alternatives over plastic

Section 2.6 Provide Clear Rules for Compostables

- Legislation and policies should ensure producers are responsible for all packaging, including compostable, to ensure the problem is not shifted to a new stream
- Costs and tonnage processing requirements are a concern for Municipalities who currently absorb all costs
- Additional capacity will be required in future to accommodate tonnages
- Standards are required to reduce resident confusion and decrease level of contamination

Section 2.7 Recover the Value of Resources

- Incentives to promote waste reduction (avoid waste generation) followed by reuse and recycling/composting are priority
- Assessments needed to demonstrate the highest value end use and appropriate processing technology for various materials
- Niagara Region has previously responded to EBR postings on soil management
- Soil must be beneficially reused from construction projects where possible
- Provincial framework for development of Excess Soil Management Plans (ESMP) would benefit municipalities

Section 2.8 Support Competitive and Sustainable End-Markets

- Past reports have flagged instability of offshore markets pricing and requirements for cleaner, uncontaminated materials
- Modernize environmental approval processes to ensure infrastructure and capacity is available for processing divertable materials
- Development and retention of recycling end markets in Ontario
- Funding for waste processing infrastructure to allow for better sorting and processing of material

Questions ?

Subject: Winter Maintenance Extension

Report to: Public Works Committee

Report date: Tuesday, April 16, 2019

Recommendations

1. That the amending agreement option to extend the term of the Area Winter Maintenance Services Contract under 2008-RFP-40 for an additional one year term ending September 3, 2020, as outlined in Appendix 1 of Report PW 18-2019, **BE APPROVED**;
2. That an amending agreement with Steed and Evans Limited **BE PREPARED** by the Director of Legal and Court Services to exercise the one year option and extend the contract end date to September 3, 2020, following Council approval; and
3. That the Chief Administrative Officer **BE AUTHORIZED** to execute the amending agreement with Steed and Evans Limited.

Key Facts

- The purpose of this report is to seek approval to exercise the option agreed to as part of the first amending agreement to extend the terms of the Area Winter Maintenance Services Contract - 2008-RFP-40 (Contract) with Steed and Evans Limited for one additional winter season (2019-2020) for reasons outlined in this report.
- The Purchasing By-law 2016-02 requires that Council approve negotiation awards/extensions greater than \$1,000,000.
- The Contract negotiated in 2008 with Steed and Evans Limited was scheduled to expire on September 6, 2018.
- Staff proceeded with an amending agreement to extend the Contract for an additional winter season (2018-2019) and include an option for a further one year extension (2019-2020).
- The negotiation award extension (2018-2019) to Steed and Evans Limited was done in accordance with Purchasing By-law 2016-02 Section 19 (a) (vi) - the extension of an existing Contract being more effective than undertaking a formal procurement process – approved by the CAO under delegated authority in the fall of 2018 pursuant to Report GM 8-2018 for a total amount of \$2,599,822 before taxes and Consumer Price Index (CPI) increase.

Financial Considerations

The amending agreement (Appendix 1) entered into with Steed and Evans Limited extended their contract to cover one additional winter season (2018-2019) and included an option for a further one year extension (2019-2020). Staff are now recommending to exercise the second one-year option on the 2019-2020 winter season. In year 11 (2018-2019), Steed and Evans Limited's contract increased by \$40,000 to cover increases to their insurance premiums plus the annual CPI increase of 2.5% (approximately \$63,995). In year 12 (2019-2020), only an annual CPI increase would be applied.

Funding for the Contract and anticipated Contract increases is provided for in the approved 2019 Transportation Services operating budget and will be provided for in the 2020 operating budget.

Transportation Operations winter maintenance budget totalling \$7,971,739 in 2016, \$8,482,487 in 2017 and \$8,301,562 in 2018 is divided into four (4) sections. A detailed budget breakdown is outlined in Appendix 2 comparing actuals to budget for calendar years 2016 - 2018. A summary of 2018 actual costs are noted below by section:

- 1) Niagara Region utilizes regional staff and equipment to provide winter maintenance to 990 lane kilometers of roadway with an actual cost of \$3,995,834 for the 2018 calendar year. It is important to note that this cost represents all vehicles and equipment, over a five-month period, within the Transportation Operations section. A more precise figure will be made available in the coming months once staff are further able to isolate work-specific tasks for each vehicle/equipment.
- 2) Area Winter Services Maintenance Contract utilizes Steed and Evans Limited staff and equipment to provide winter maintenance to 674 lane kilometers of roadway with an actual cost of \$2,821,368 for the 2018 calendar year.
- 3) City of St Catharines utilizes city staff and equipment to provide winter maintenance to 126 lane kilometers of roadway at a cost of \$348,617 for the 2018 calendar year.
- 4) Supporting winter services activities are delivered across the entire regional road network of 1790 lane kilometers with a budget of \$852,498 for the 2018 calendar year. Services such as snow fence erection and removal, winter sand cleanup and winter drainage are delivered through a combination of Niagara Region staff and outside contractors.

Niagara Region's actual costs in 2016 and 2017 are significantly lower than budgeted cost due to the milder winter conditions resulting in lower overtime costs and lower fuel usage. The 2018 calendar year costs are higher due to the increase in winter events

from January to April. The City of St. Catharines' actual costs are relatively constant from 2016 - 2018. The Contract, with Steeds and Evans Limited, (a fixed price plus contract) actual costs are relatively flat to budget costs with the slight variance attributed to adjustments for fuel and salt usage.

Analysis

Niagara Region operates within a "hybrid" business model during the winter season utilizing the Niagara Region, City of St. Catharines and an Area Maintenance Contractor (currently Steed and Evans Limited) forces.

- Niagara Region Staff maintain 19 plow routes covering 990 lane kilometers of roadway.
- City of St. Catharines maintain 126 lane kilometers of Regional Roads through an amalgamation of Region Roads within in the City's own routing system.
- Steed and Evans Limited maintains 10 plow routes covering 674 lane kilometers.

As outlined in the Corporate Value for Money Audit of Snowplowing, Road Maintenance and Land Scaping Services eight (8) recommendations were provided concerning value-for-money, effective risk management and operational Improvement for winter control.

Several of these recommendations required staff to collect the necessary data, which will influence the terms of a new Area Winter Maintenance Services Contract.

- **R1: Document the end time of winter events so it is possible to measure the time it takes to reclaim bare pavement.**
 - Starting in 2016, Staff have collected this information and at the end of the 2018-2019 winter season will have three (3) complete winter seasons to analyse. This information measures timeframes for reclaiming bare pavement as per winter Maintenance Standards contained in Ontario Regulation 366/18. This data will be used to update our Level of Service documents to be included in the tendering of a new Area Maintenance Services contract.
- **R2: Restructuring budgeting/ accounting to separate core winter services from supporting services and allow accurate comparisons of the costs of direct delivery versus contracted delivery for winter control.**
 - The implementation of The Enhanced Financial Management Service has allowed Staff to streamline finance processes and provide comprehensive reporting capabilities. As shown in Appendix 1, Niagara Region winter control costs are in line with Steed and Evans Limited costs. At the end of the 2018-2019 winter season, Staff will have three (3) full years of data to analyse.
- **R3: Collect and use pass kilometer data to better monitor and report on winter control activities.**

- In 2016 staff began to collect this information and determined that comparing costs against actual lane kilometers was a more productive measure because it could be calculated utilizing our existing plow routes. This GIS data could be updated yearly to reflect any additions or subtractions of road segments throughout the year as indicated in Appendix 2.
- **R4: Implement winter control achievement reports for winter storm events.**
 - Niagara Region Staff have collected this information starting in the 2016–2017 winter season. In the 2017-2018 winter season Steed and Evans Limited also began collecting this data. This data measures the event responses by Niagara Region and its contracted service providers.
 - System wide winter event responses > 24 hours in duration;
 - System wide winter event responses < 24 hours in duration
 - Significant localized winter event responses > hours in duration.

This data will be used to update our Level of Service documents to be included in the tendering of a new Area Maintenance Services contract.

- **R5: Provide Annual reports to Council on the level of service achievement for the winter season.**
 - Staff have developed a process to collect the necessary data recommended over the last two winter seasons and will provide a report outlining these findings at the end of the 2018 - 2019 winter season.
- **R6: Reduce the Winter Control Budget to the level required for a typical winter instead of a severe winter.**
 - Through the annual budget approval process over the last three (3) years, staff have adjusted the budgets accordingly based on Council guidance.
- **R7: Prepare in advance for forecasted winter storm events by rescheduling staff shifts within the two-week pay period.**
 - Staff have adjusted winter shift schedules accordingly based on weather forecasts and the conditions outlined in the CUPE 1287 Collective Agreement.
- **R8: Conduct a competitive service delivery exercise at the end of the current winter contract encompassing all established routes.**
 - This analysis will be completed after the 2018 – 2019 winter season. Yard replacement/rehabilitation decisions at Niagara Region's Smithville and Pelham patrol yards will have to be taken into consideration as part of this analysis.

Staff have been in communication with the MTO on their new Contractor Directed Maintenance Contract model that commenced in August 2018. Staff will be reviewing

the effectiveness of this new contract throughout the 2018-2019 winter season with MTO staff in order to see if the principle concepts in this contract can be applied to Niagara Region's next Area Maintenance Services contract.

The Transportation Master Plan has put more emphasis on street scaping and active transportation. In the short term, by 2021, the Region will focus on implementing policies that will transform its approach to transportation, addressing existing constraints in the road system, filling in gaps in the active transportation network, and taking the next steps to plan for the major network needs for the future. Specifically, the early actions to be undertaken in the first five (5) years of the program include incorporating the Complete Streets approach in the Region's design process. Staff are gathering information on how these changes will impact winter maintenance costs.

The major objective for winter operations are to meet or exceed the Minimum Maintenance Standards for Municipal Highways (Ontario Provincial Regulation 239/02 – Municipal Act 2001). This regulation was amended May 3, 2018 to the Minimum Maintenance Standards for Municipal Highways O. Reg. 366/18 (Appendix 3). These amendments added maintenance sections on snow accumulation on bicycle lanes. Staff will be compiling data on additional maintenance costs associated with this change that will be incorporated into a new winter maintenance services contract to ensure compliance with the Act.

Alternatives Reviewed

In 2017, staff considered issuing a two year contract to cover the 2018-2019 and 2019 – 2020 winter seasons. When reviewing this option, Staff felt it was an unreasonable expectation to ask a contractor to capitalize a fleet in a competitive procurement process for this short duration (2 years). It is Staff's recommendation to go forward with a procurement in the fall of 2019 for a new 10-year winter maintenance contract once the data collection analysis identified in the Value for Money Audit, as noted above, is completed, and staff can incorporate necessary changes in the new Area Maintenance Services Contract document. The new contract will commence in October 2020.

Steed and Evans Limited has indicated they have no concerns utilizing their existing fleet throughout the proposed extension.

Relationship to Council Strategic Priorities

Moving people and goods: winter maintenance activities allow for the safe movement of vehicles and pedestrians throughout the Niagara Region.

Other Pertinent Reports

- Value for Money Audit of Snowplowing, Roads Maintenance, and Landscaping Services – Final Report 15-2387

Prepared by:

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Associate Director Transportation

Recommended by:

Catherine Habermehl
Acting Commissioner
Public Works Department

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

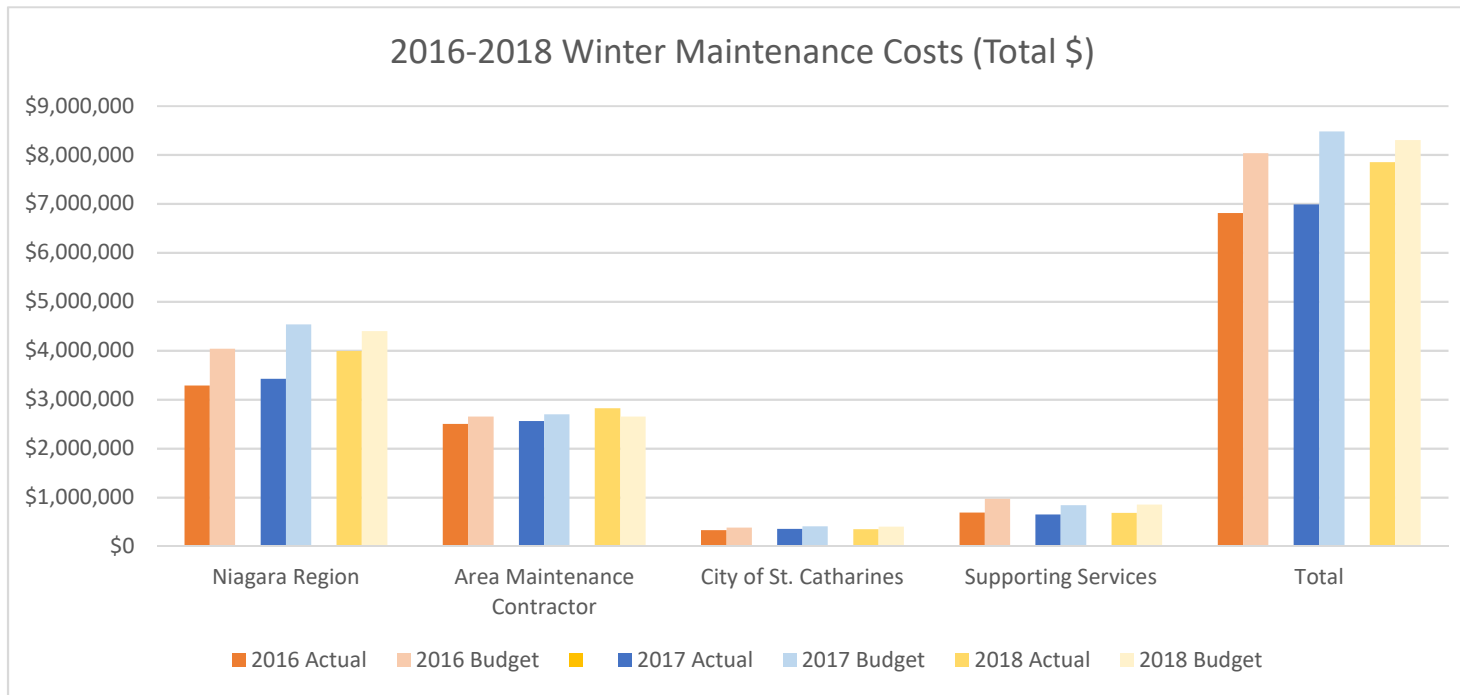
This report was prepared in consultation with Brian McMahon Program Financial Analyst, reviewed by Carolyn Ryall, Director Transportation Services and Curt Anderson, Manager Road and Bridge Operations.

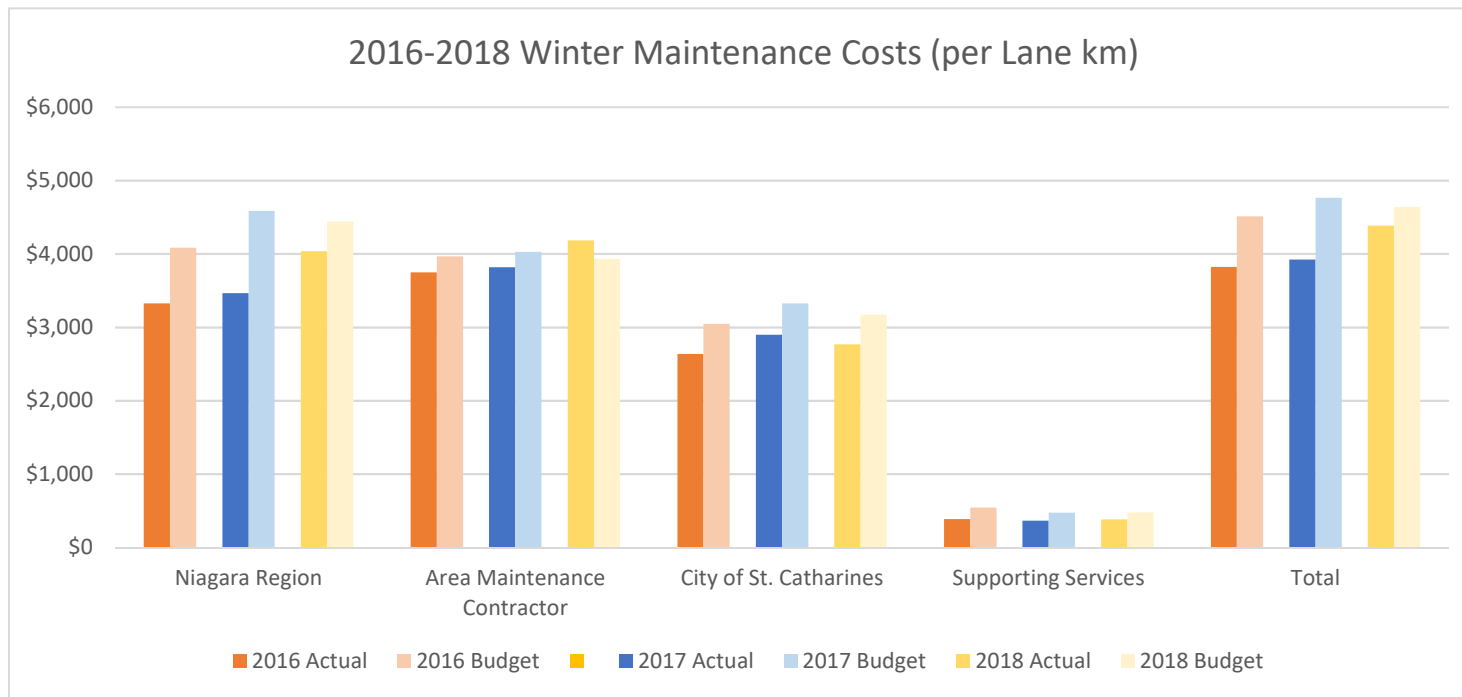
Appendices

Appendix 1	Winter Maintenance Costs
Appendix 2	Amending Agreement 2008-RFP-40
Appendix 3	Minimum Maintenance Standards for Municipal Highways O. Reg. 366/18

2016-2018 Winter Maintenance Costs
Budget vs Actuals

Budget vs Actual \$	Niagara Region			Area Maintenance Contractor			City of St. Catharines			Supporting Services			Total		
	989	989	990	668	670	674	125	122	126	1782	1781	1790	1782	1781	1790
	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018	2016	2017	2018
Total Lane Km's Maintained															
Year															
Winter Budget	4,037,881	4,533,599	4,399,064	2,650,000	2,700,000	2,650,000	381,000	406,000	400,000	968,289	842,888	852,498	8,037,170	8,482,487	8,301,562
Winter Actual	3,287,709	3,425,507	3,995,834	2,504,624	2,559,293	2,821,368	329,728	353,490	348,617	687,276	648,681	686,215	6,809,336	6,986,972	7,852,034
Budgeted Cost per lane Km	4,083	4,584	4,443	3,967	4,030	3,932	3,048	3,328	3,175	543	473	476	4,510	4,763	4,638
Actual Cost per Lane Km	3,324	3,464	4,036	3,749	3,820	4,186	2,638	2,897	2,767	386	364	383	3,821	3,923	4,387





PW 18-2019 Appendix 2

AMENDING AGREEMENT

THIS AGREEMENT made as of the 4th day of September, 2018.

BETWEEN:

THE REGIONAL MUNICIPALITY OF NIAGARA

(Hereinafter called the "**Region**")

- and -

STEED AND EVANS LIMITED

(Hereinafter called the "**Contractor**")

WHEREAS by an Agreement dated the 6th day of October, 2008 (hereinafter called the "Original Agreement"), the Region and the Contractor agreed that the Contractor shall provide Area Winter Maintenance Services under 2008-RFP-40 (hereinafter called the "Project");

AND WHEREAS the parties hereto desire to amend the Original Agreement to extend the term of the Original Agreement;

NOW THEREFORE this in consideration of the sum of TWO DOLLARS (\$2.00) and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

1. The Original Agreement shall be amended as of the date set out above for one additional year ending on September 3, 2019 with the option in favour of Niagara Region and at Niagara Region's sole and absolute discretion to extend the term for one additional one year term ending on September 3, 2020.
2. Payment to the Contractor shall be in accordance with the terms and conditions outlined in the Original Agreement, save an except for a one-time increase to the annual payment of \$40,000.00 to cover increased insurance premiums. The parties agree the applicable aggregate fee, inclusive of the \$40,000.00 increase, for the period September 4, 2018 to September 3rd, 2019, is \$2,599,822.11.
3. Section 2.5 Contract Security in 2008-RFP-40 forming part of the Original Agreement shall be amended by requiring the substitution of a Performance Bond in the amount of \$2,000,000.00 in place of the Original Agreement requirement of a combination Performance Bond and Letter of Credit, which replacement Performance Bond shall will remain in effect for the duration of the contract.
4. The terms, covenants, provisos, and stipulations in the Original Agreement are hereby confirmed in full force save and except such modifications only as are necessary to make them applicable to this Amending Agreement.

IN WITNESS WHEREOF the parties hereto have duly executed this Agreement.

THE REGIONAL MUNICIPALITY OF NIAGARA

Per:



Name: Carmelo D'Angelo, BSC, MPA

Title: Chief Administrative Officer

I have the authority to bind the Corporation.

STEED AND EVANS LIMITED

Per:

Bob Hunter 
Name: Construction Manager
Title:

Name:

Title:

We have the authority to bind the Corporation.

PW 18-2019 Appendix 3

O. Reg. 366/18: MINIMUM MAINTENANCE STANDARDS FOR MUNICIPAL HIGHWAYS

filed May 3, 2018 under [Municipal Act, 2001, S.O. 2001, c. 25](#)

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ontario regulation 366/18

made under the

Municipal Act, 2001

Made: May 2, 2018

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Published on e-Laws: May 3, 2018

Printed in *The Ontario Gazette*: May 19, 2018

Amending O. Reg. 239/02

(MINIMUM MAINTENANCE STANDARDS FOR MUNICIPAL HIGHWAYS)

1. (1) The definition of “surface” in subsection 1 (1) of Ontario Regulation 239/02 is amended by striking out “roadway or shoulder” and substituting “sidewalk, roadway or shoulder”.

(2) Subsection 1 (1) of the Regulation is amended by adding the following definitions:

“bicycle facility” means the on-road and in-boulevard cycling facilities listed in Book 18 of the Ontario Traffic Manual;

“bicycle lane” means,

(a) a portion of a roadway that has been designated by pavement markings or signage for the preferential or exclusive use of cyclists, or

(b) a portion of a roadway that has been designated for the exclusive use of cyclists by signage and a physical or marked buffer;

“encroachment” means anything that is placed, installed, constructed or planted within the highway that was not placed, installed, constructed or planted by the municipality;

“pothole” means a hole in the surface of a roadway caused by any means, including wear or subsidence of the road surface or subsurface;

“sidewalk” means the part of the highway specifically set aside or commonly understood to be for pedestrian use, typically consisting of a paved surface but does not include crosswalks, medians, boulevards, shoulders or any part of the sidewalk where cleared snow has been deposited;

“significant weather event” means an approaching or occurring weather hazard with the potential to pose a significant danger to users of the highways within a municipality;_

“utility” includes any air, gas, water, electricity, cable, fiber-optic, telecommunication or traffic control system or subsystem, fire hydrants, sanitary sewers, storm sewers, property bars and survey monuments;

“utility appurtenance” includes maintenance holes and hole covers, water shut-off covers and boxes, valves, fittings, vaults, braces, pipes, pedestals, and any other structures or items that form part of or are an accessory part of any utility;

“weather hazard” means the weather hazards determined by Environment Canada as meeting the criteria for the issuance of an alert under its Public Weather Alerting Program.

(3) Subsections 1 (2) and (3) of the Regulation are amended by striking out “annual” wherever it appears.

(4) Subsection 1 (4) of the Regulation is revoked and the following substituted:

(4) For the purposes of this Regulation, unless otherwise indicated in a provision of this Regulation, a municipality is deemed to be aware of a fact if, in the absence of actual knowledge of the fact, circumstances are such that the municipality ought reasonably to be aware of the fact.

(5) The Table to section 1 of the Regulation is revoked and the following substituted:

TABLE
CLASSIFICATION OF HIGHWAYS

Column 1 Average Daily Traffic (number of motor vehicles)	Column 2 91 - 100 km/h speed limit	Column 3 81 - 90 km/h speed limit	Column 4 71 - 80 km/h speed limit	Column 5 61 - 70 km/h speed limit	Column 6 51 - 60 km/h speed limit	Column 7 41 - 50 km/h speed limit	Column 8 1 - 40 km/h speed limit
53,000 or more	1	1	1	1	1	1	1
23,000 - 52,999	1	1	1	2	2	2	2
15,000 - 22,999	1	1	2	2	2	3	3
12,000 - 14,999	1	1	2	2	2	3	3
10,000 - 11,999	1	1	2	2	3	3	3
8,000 - 9,999	1	1	2	3	3	3	3
6,000 - 7,999	1	2	2	3	3	4	4
5,000 - 5,999	1	2	2	3	3	4	4
4,000 - 4,999	1	2	3	3	3	4	4
3,000 - 3,999	1	2	3	3	3	4	4
2,000 - 2,999	1	2	3	3	4	5	5
1,000 - 1,999	1	3	3	3	4	5	5
500 - 999	1	3	4	4	4	5	5
200 - 499	1	3	4	4	5	5	6
50 - 199	1	3	4	5	5	6	6
0 - 49	1	3	6	6	6	6	6

2. The Regulation is amended by adding the following section:**Purpose**

2.1 The purpose of this Regulation is to clarify the scope of the statutory defence available to a municipality under clause 44 (3) (c) of the Act by establishing maintenance standards which are non-prescriptive as to the methods or materials to be used in complying with the standards but instead describe a desired outcome.

3. (1) The heading before section 3 of the Regulation is amended by striking out “MINIMUM” and substituting “MAINTENANCE”

(2) Subsections 3 (1) and (2) of the Regulation are amended by striking out “minimum” wherever it appears.

(3) Subsection 3 (4) of the Regulation is amended by striking out “section 16.1” and substituting “section 16.1, 16.2, 16.3 or 16.4”.

4. Subsections 3.1 (1) and (2) of the Regulation are amended by striking out “minimum” wherever it appears.

5. (1) Subsection 4 (1) of the Regulation is amended by striking out the portion before clause (a) and substituting the following:

Snow accumulation, roadways

(1) Subject to section 4.1, the standard for addressing snow accumulation on roadways is,

.....

(2) Subsection 4 (3) of the Regulation is amended by adding “and, if applicable, lane width under clause (1) (b),” after “roadway” in the portion before paragraph 1.

(3) Subsection 4 (4) of the Regulation is amended by adding “and lane width” after “roadway” in the portion before clause (a).

(4) Subsections 4 (5) and (6) of the Regulation are revoked and the following substituted:

(5) For the purposes of this section, addressing snow accumulation on a roadway includes,

(a) plowing the roadway;

(b) salting the roadway;

(c) applying abrasive materials to the roadway;

(d) applying other chemical or organic agents to the roadway;

(e) any combination of the methods described in clauses (a) to (d);

(6) This section does not apply to that portion of the roadway,

- (a) designated for parking;
- (b) consisting of a bicycle lane or other bicycle facility; or
- (d) used by a municipality for snow storage;

(5) The heading of the Table to section 4 of the Regulation is revoked and the following substituted:

SNOW ACCUMULATION - ROADWAYS

7. The Regulation is amended by adding the following sections:

Snow accumulation on roadways, significant weather event

4.1 (1) If a municipality declares a significant weather event relating to snow accumulation, the standard for addressing snow accumulation on roadways until the declaration of the end of the significant weather event is,

- (a) to monitor the weather in accordance with section 3.1; and
 - (b) if deemed practicable by the municipality, to deploy resources to address snow accumulation on roadways, starting from the time that the municipality deems appropriate to do so.
- (2) If the municipality complies with subsection (1), all roadways within the municipality are deemed to be in a state of repair with respect to snow accumulation until the applicable time in the Table to section 4 expires following the declaration of the end of the significant weather event by the municipality.
- (3) Following the end of the weather hazard in respect of which a significant weather event was declared by a municipality under subsection (1), the municipality shall,
- (a) declare the end of the significant weather event when the municipality determines it is appropriate to do so; and
 - (b) address snow accumulation on roadways in accordance with section 4.

Snow accumulation, bicycle lanes

4.2 (1) Subject to section 4.3, the standard for addressing snow accumulation on bicycle lanes is,

- (a) after becoming aware of the fact that the snow accumulation on a bicycle lane is greater than the depth set out in the Table to this section, to deploy resources as soon as practicable to address the snow accumulation; and
 - (b) after the snow accumulation has ended, to address the snow accumulation so as to reduce the snow to a depth less than or equal to the depth set out in the Table to this section to provide a minimum bicycle lane width of the lesser of 1 metre or the actual bicycle lane width.
- (2) If the depth of snow accumulation on a bicycle lane is less than or equal to the depth set out in the Table to this section, the bicycle lane is deemed to be in a state of repair in respect of snow accumulation.

(3) For the purposes of this section, the depth of snow accumulation on a bicycle lane and, if applicable, lane width under clause (1) (b), may be determined in the same manner as set out in subsection 4 (4) and by the persons mentioned in subsection 4 (3), with necessary modifications.

(4) For the purposes of this section, addressing snow accumulation on a bicycle lane includes,

- (a) plowing the bicycle lane;
- (b) salting the bicycle lane;
- (c) applying abrasive materials to the bicycle lane;
- (d) applying other chemical or organic agents to the bicycle lane;
- (e) sweeping the bicycle lane; or
- (f) any combination of the methods described in clauses (a) to (e).

TABLE

Snow Accumulation – Bicycle Lanes

Column 1	Column 2	Column 3
Class of Highway or Adjacent Highway	Depth	Time
1	2.5 cm	8 hours
2	5 cm	12 hours
3	8 cm	24 hours
4	8 cm	24 hours
5	10 cm	24 hours

Snow accumulation on bicycle lanes, significant weather event

4.3 (1) If a municipality declares a significant weather event relating to snow accumulation, the standard for addressing snow accumulation on bicycle lanes until the declaration of the end of the significant weather event is,

- (a) to monitor the weather in accordance with section 3.1; and
- (b) if deemed practicable by the municipality, to deploy resources to address snow accumulation on bicycle lanes, starting from the time that the municipality deems appropriate to do so.

(2) If the municipality complies with subsection (1), all bicycle lanes within the municipality are deemed to be in a state of repair with respect to snow accumulation until the applicable time in the Table to section 4.2 expires following the declaration of the end of the significant weather event by the municipality.

(3) Following the end of the weather hazard in respect of which a significant weather event was declared by a municipality under subsection (1), the municipality shall,

(a) declare the end of the significant weather event when the municipality determines it is appropriate to do so; and

(b) address snow accumulation on bicycle lanes in accordance with section 4.2.

8. Section 5 of the Regulation is revoked and the following substituted:

Ice formation on roadways and icy roadways

5. (1) The standard for the prevention of ice formation on roadways is doing the following in the 24-hour period preceding an alleged formation of ice on a roadway:

1. Monitor the weather in accordance with section 3.1.

2. Patrol in accordance with section 3.

3. If the municipality determines, as a result of its activities under paragraph 1 or 2, that there is a substantial probability of ice forming on a roadway, treat the roadway, if practicable, to prevent ice formation within the time set out in Table 1 to this section, starting from the time that the municipality determines is the appropriate time to deploy resources for that purpose.

(2) If the municipality meets the standard set out in subsection (1) and, despite such compliance, ice forms on a roadway, the roadway is deemed to be in a state of repair until the applicable time set out in Table 2 to this section expires after the municipality becomes aware of the fact that the roadway is icy.

(3) Subject to section 5.1, the standard for treating icy roadways is to treat the icy roadway within the time set out in Table 2 to this section, and an icy roadway is deemed to be in a state of repair until the applicable time set out in Table 2 to this section expires after the municipality becomes aware of the fact that a roadway is icy.

(4) For the purposes of this section, treating a roadway means applying material to the roadway, including but not limited to, salt, sand or any combination of salt and sand.

(5) For greater certainty, this section applies in respect of ice formation on bicycle lanes on a roadway, but does not apply to other types of bicycle facilities.

TABLE 1
ice formation prevention

Class of Highway	Time
1	6 hours
2	8 hours
3	16 hours
4	24 hours
5	24 hours

TABLE 2
Treatment of ICY ROADWAYS

Class of Highway	Time
1	3 hours
2	4 hours
3	8 hours
4	12 hours
5	16 hours

Icy roadways, significant weather event

5.1 (1) If a municipality declares a significant weather event relating to ice, the standard for treating icy roadways until the declaration of the end of the significant weather event is,

(a) to monitor the weather in accordance with section 3.1; and

(b) if deemed practicable by the municipality, to deploy resources to treat icy roadways, starting from the time that the municipality deems appropriate to do so.

(2) If the municipality complies with subsection (1), all roadways within the municipality are deemed to be in a state of repair with respect to any ice which forms or may be present until the applicable time in Table 2 to section 5 expires after the declaration of the end of the significant weather event by the municipality.

(3) Following the end of the weather hazard in respect of which a significant weather event was declared by a municipality under subsection (1), the municipality shall,

(a) declare the end of the significant weather event when the municipality determines it is appropriate to do so; and

(b) treat icy roadways in accordance with section 5.

8. (1) Subsection 6 (1) of the Regulation is amended by striking out “minimum”.

(2) Section 6 of the Regulation is amended by adding the following subsections:

(1.1) For the purposes of this section, the surface area and depth of a pothole may be determined in accordance with subsections (1.2) and (1.3), as applicable, by a municipal employee, agent or contractor whose duties or responsibilities include one or more of the following:

1. Patrolling highways.

2. Performing highway maintenance activities.

3. Supervising staff who perform activities described in paragraph 1 or 2.

(1.2) The depth and surface area of a pothole may be determined by,

(a) performing an actual measurement; or

(b) performing a visual estimate.

(1.3) For the purposes of this section, the surface area of a pothole does not include any area that is merely depressed and not yet broken fully through the surface of the roadway.

9. (1) Subsections 7 (1) and (2) of the Regulation are revoked and the following substituted:

Shoulder drop-offs

(1) If a shoulder drop-off is deeper than 8 cm, for a continuous distance of 20 metres or more, the standard is to repair the shoulder drop-off within the time set out in the Table to this section after becoming aware of the fact.

(2) A shoulder drop-off is deemed to be in a state of repair if its depth is less than 8 cm.

(2) The Table to section 7 of the Regulation is revoked and the following substituted:

TABLE
SHOULDER DROP-OFFS

Class of Highway	Time
1	4 days
2	4 days
3	7 days
4	14 days
5	30 days

10. (1) Subsections 8 (1) and (2) of the Regulation are revoked and the following substituted:

Cracks

(1) If a crack on the paved surface of a roadway is greater than 5 cm wide and 5 cm deep for a continuous distance of three metres or more, the standard is to repair the crack within the time set out in the Table to this section after becoming aware of the fact.

(2) A crack is deemed to be in a state of repair if its width or depth is less than or equal to 5 cm.

(2) The Table to section 8 of the Regulation is revoked and the following substituted:

TABLE
CRACKS

Column 1	Column 2
Class of Highway	Time
1	30 days
2	30 days
3	60 days

4	180 days
5	180 days

11. Subsection 9 (1) of the Regulation is amended by striking out “minimum”.

12. Subsections 10 (0.1), (1), (2), (3), (4), (5) and (6) of the Regulation are revoked and the following substituted:

Luminaires

(1) The standard for the frequency of inspecting all luminaires to check to see that they are functioning is once per calendar year, with each inspection taking place not more than 16 months from the previous inspection.

(2) For conventional illumination, if three or more consecutive luminaires on the same side of a highway are not functioning, the standard is to repair the luminaires within the time set out in the Table to this section after becoming aware of the fact.

(3) For conventional illumination and high mast illumination, if 30 per cent or more of the luminaires on any kilometre of highway are not functioning, the standard is to repair the luminaires within the time set out in the Table to this section after becoming aware of the fact.

(4) Despite subsection (2), for high mast illumination, if all of the luminaires on consecutive poles on the same side of a highway are not functioning, the standard is to deploy resources as soon as practicable after becoming aware of the fact to repair the luminaires.

(5) Despite subsections (1), (2) and (3), for conventional illumination and high mast illumination, if more than 50 per cent of the luminaires on any kilometre of a Class 1 highway with a speed limit of 90 kilometres per hour or more are not functioning, the standard is to deploy resources as soon as practicable after becoming aware of the fact to repair the luminaires.

(6) Luminaires are deemed to be in a state of repair,

(a) for the purpose of subsection (2), if the number of non-functioning consecutive luminaires on the same side of a highway does not exceed two;

(b) for the purpose of subsection (3), if more than 70 per cent of luminaires on any kilometre of highway are functioning;

(c) for the purpose of subsection (4), if one or more of the luminaires on consecutive poles on the same side of a highway are functioning;

(d) for the purpose of subsection (5), if more than 50 per cent of luminaires on any kilometre of highway are functioning.

13. The Regulation is amended by striking out “minimum” wherever it appears in the following provisions:

1. Sections 11 to 16.

2. Subsection 16.1 (1).**14. Subsections 16.1 (2), (2.1), (3) and (4) of the Regulation are revoked and the following substituted:**

(2) If a surface discontinuity on or within a sidewalk exceeds two centimetres, the standard is to treat the surface discontinuity within 14 days after acquiring actual knowledge of the fact.

(3) A surface discontinuity on or within a sidewalk is deemed to be in a state of repair if it is less than or equal to two centimetres.

(4) For the purpose of subsection (2), treating a surface discontinuity on or within a sidewalk means taking reasonable measures to protect users of the sidewalk from the discontinuity, including making permanent or temporary repairs, alerting users' attention to the discontinuity or preventing access to the area of discontinuity.

(5) In this section,

“surface discontinuity” means a vertical discontinuity creating a step formation at any joint or crack in the surface of the sidewalk or any vertical height difference between a utility appurtenance found on or within the sidewalk and the surface of the sidewalk.

15. The Regulation is amended by adding the following sections.**Encroachments, area adjacent to sidewalk**

16.2 (1) The standard for the frequency of inspecting an area adjacent to a sidewalk to check for encroachments is once per calendar year, with each inspection taking place not more than 16 months from the previous inspection.

(2) The area adjacent to a sidewalk that has been inspected in accordance with subsection (1) is deemed to be in a state of repair in respect of any encroachment present.

(3) For greater certainty, the area adjacent to a sidewalk begins at the outer edges of a sidewalk and ends at the lesser of the limit of the highway, the back edge of a curb if there is a curb and a maximum of 45 cm.

(4) The area adjacent to a sidewalk is deemed to be in a state of repair in respect of any encroachment present unless the encroachment is determined by a municipality to be highly unusual given its character and location or to constitute a significant hazard to pedestrians.

(5) If a municipality determines that an encroachment is highly unusual given its character and location or constitutes a significant hazard to pedestrians, the standard is to treat the encroachment within 28 days after making such a determination, and the encroachment is deemed in a state of repair for 28 days from the time of the determination by the municipality.

(6) For the purpose of subsection (4), treating an encroachment means taking reasonable measures to protect users, including making permanent or temporary repairs, alerting users' attention to the encroachment or preventing access to the area of the encroachment.

Snow accumulation on sidewalks

16.3 (1) Subject to section 16.4, the standard for addressing snow accumulation on a sidewalk after the snow accumulation has ended is,

a) to reduce the snow to a depth less than or equal to 8 centimetres within 48 hours; and

b) to provide a minimum sidewalk width of 1 metre.

(2) If the depth of snow accumulation on a sidewalk is less than or equal to 8 centimetres, the sidewalk is deemed to be in a state of repair in respect of snow accumulation.

(3) If the depth of snow accumulation on a sidewalk exceeds 8 centimetres while the snow continues to accumulate, the sidewalk is deemed to be in a state of repair with respect to snow accumulation, until 48 hours after the snow accumulation ends.

(4) For the purposes of this section, the depth of snow accumulation on a sidewalk may be determined in the same manner as set out in subsection 4 (4) and by the persons mentioned in subsection 4 (3) with necessary modifications.

(5) For the purposes of this section, addressing snow accumulation on a sidewalk includes,

(a) plowing the sidewalk;

(b) salting the sidewalk;

(c) applying abrasive materials to the sidewalk;

(d) applying other chemical or organic agents to the sidewalk; or

(e) any combination of the methods described in clauses (a) to (d).

Snow accumulation on sidewalks, significant weather event

16.4 (1) If a municipality declares a significant weather event relating to snow accumulation, the standard for addressing snow accumulation on sidewalks until the declaration of the end of the significant weather event is,

(a) to monitor the weather in accordance with section 3.1; and

(b) if deemed practicable by the municipality, to deploy resources to address snow accumulation on sidewalks starting from the time that the municipality deems appropriate to do so.

(2) If the municipality complies with subsection (1), all sidewalks within the municipality are deemed to be in a state of repair with respect to any snow present until 48 hours following the declaration of the end of the significant weather event by the municipality.

(3) Following the end of the weather hazard in respect of which a significant weather event was declared by a municipality under subsection (1), the municipality shall,

(a) declare the end of the significant weather event when the municipality determines it is appropriate to do so; and

(b) address snow accumulation on sidewalks in accordance with section 16.3.

Ice formation on sidewalks and icy sidewalks

16.5 (1) Subject to section 16.6, the standard for the prevention of ice formation on sidewalks is to,

(a) monitor the weather in accordance with section 3.1 in the 24-hour period preceding an alleged formation of ice on a sidewalk; and

(b) treat the sidewalk if practicable to prevent ice formation or improve traction within 48 hours if the municipality determines that there is a substantial probability of ice forming on a sidewalk, starting from the time that the municipality determines is the appropriate time to deploy resources for that purpose.

(2) If ice forms on a sidewalk even though the municipality meets the standard set out in subsection (1), the sidewalk is deemed to be in a state of repair in respect of ice until 48 hours after the municipality first becomes aware of the fact that the sidewalk is icy.

(3) The standard for treating icy sidewalks after the municipality becomes aware of the fact that a sidewalk is icy is to treat the icy sidewalk within 48 hours, and an icy sidewalk is deemed to be in a state of repair for 48 hours after it has been treated.

(4) For the purposes of this section, treating a sidewalk means applying materials including salt, sand or any combination of salt and sand to the sidewalk.

Icy sidewalks, significant weather event

16.6 (1) If a municipality declares a significant weather event relating to ice, the standard for addressing ice formation or ice on sidewalks until the declaration of the end of the significant weather event is,

(a) to monitor the weather in accordance with section 3.1; and

(b) if deemed practicable by the municipality, to deploy resources to treat the sidewalks to prevent ice formation or improve traction, or treat the icy sidewalks, starting from the time that the municipality deems appropriate to do so.

(2) If the municipality complies with subsection (1), all sidewalks within the municipality are deemed to be in a state of repair with respect to any ice which forms or is present until 48 hours after the declaration of the end of the significant weather event by the municipality.

(3) Following the end of the weather hazard in respect of which a significant weather event was declared by a municipality under subsection (1), the municipality shall,

(a) declare the end of the significant weather event when the municipality determines it is appropriate to do so; and

(b) address the prevention of ice formation on sidewalks or treat icy sidewalks in accordance with section 16.5.

Winter sidewalk patrol

16.7 (1) If it is determined by the municipality that the weather monitoring referred to in section 3.1 indicates that there is a substantial probability of snow accumulation on sidewalks in excess of 8 cm, ice

formation on sidewalks or icy sidewalks, the standard for patrolling sidewalks is to patrol sidewalks that the municipality selects as representative of its sidewalks at intervals deemed necessary by the municipality.

(2) Patrolling a sidewalk consists of visually observing the sidewalk, either by driving by the sidewalk on the adjacent roadway or by driving or walking on the sidewalk or by electronically monitoring the sidewalk, and may be performed by persons responsible for patrolling roadways or sidewalks or by persons responsible for or performing roadway or sidewalk maintenance activities.

Closure of a highway

16.8 (1) When a municipality closes a highway or part of a highway pursuant to its powers under the Act, the highway is deemed to be in a state of repair in respect of all conditions described in this Regulation from the time of the closure until the highway is re-opened by the municipality.

(2) For the purposes of subsection (1), a highway or part of a highway is closed on the earlier of,

(a) when a municipality passes a by-law to close the highway or part of the highway; and

(b) when a municipality has taken such steps as it determines necessary to temporarily close the highway or part of a highway.

Declaration of significant weather event

16.9. A municipality declaring the beginning of a significant weather event or declaring the end of a significant weather event under this Regulation shall do so in one or more of the following ways:

1. By posting a notice on the municipality's website.

2. By making an announcement on a social media platform, such as Facebook or Twitter.

3. By sending a press release or similar communication to internet, newspaper, radio or television media.

4. By notification through the municipality's police service.

5. By any other notification method required in a by-law of the municipality.

Commencement

16. This Regulation comes into force on the day it is filed.

Made by:

Kathryn McGarry

Minister of Transportation

Date made: May 2, 2018

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Subject: Transportation Infrastructure Means Protection Update

Report to: Public Works Committee

Report date: Tuesday, April 16, 2019

Recommendations

1. That the recommendations contained in the *Transportation Infrastructure Means Protection* report, attached as Appendix 2 to Report PW 24-2019, **BE ENDORSED**;
2. That staff **BE DIRECTED** to proceed with the detailed design and tendering of the Transportation Infrastructure Means Protection project; and
3. That financing in the amount of \$4,000,000 gross and net **BE INITIATED** from the approved 2019 capital budget for the Transportation Infrastructure Means Protection project and that the project **BE FUNDED** as follows:
 - Reserves – Capital Levy - \$4,000,000

Key Facts

- The purpose of this report is to update Council on the status of the preliminary design report completed by Parsons Inc. (March 2019) and to seek direction on proceeding with the detailed design and tender package creation.
- In January 2019 Niagara Region's Medical Officer of Health and Commissioner (Acting), M. Mustafa Hirji, brought forward a report to Public Health and Social Services Committee entitled *PHD 03-2019 Preventing Deaths by Suicide on Public Infrastructure (PHD 03-2019)*. *PHD 03-2019* is attached as Appendix 1.
- In consideration of *PHD 03-2019*, Committee approved a means prevention barrier at location StC-1, and directed staff to proceed with planning and to report back in the spring with a final recommendation and a detailed cost estimate.
- During 2019 Capital Budget deliberations, staff was directed to include \$4,000,000 in the 2019 Capital Budget for the Transportation Infrastructure Means Protection project subject to Committee and Council approval of project initiation.
- Due to the extreme sensitivity of this project, and timeliness of erecting the means protection barriers being of significant importance (to address risk of additional deaths), staff are recommending that Parsons Inc. be directly retained to proceed

with the detailed design and tender package creation in accordance with Niagara Region's Purchasing Bylaw.

- In January 2019, Region staff directly retained Parsons Inc. to complete a preliminary design report for Means Protection at StC-1, the direct award was attributed to the following:
 - The sensitive nature of the subject at hand
 - The need to expedite the composition of such report
 - Parsons familiarity with the structural design of the structure having been the original designer
- In late March 2019, staff received the final report completed by Parsons Inc. entitled *Transportation Infrastructure Means Protection (TIMP)* (Appendix 2).
- The TIMP report reviewed several areas of interest including the following:
 - Current state of the structure
 - A number of other structures throughout North America along with means protection design utilized on each structure
 - Options for outer wall barriers
 - Options for inner wall barriers
 - Construction materials
 - Capital cost associated with construction
- The estimated cost of construction for the means protection barrier would be in the order of \$2,977,350 excluding taxes.

Financial Considerations

The full cost of implementing means protection barriers at StC-1 is estimated to be in the order of \$3,508,023 (including 1.76% non-refundable HST). These costs include the following items:

- Detailed design of the barrier system
- Tendering
- Labor and material associated with the installation of the barrier system
- Contract administration and inspection of the barrier system
- Approval and coordination with MTO
- Miscellaneous contract costs

Should any deviation from these costs arise that cannot be accommodated within the \$4,000,000 budget, staff will come back to Council in accordance with the budget control by-law.

Financial evaluation of the preferred barrier system should closely consider the lifecycle cost of the barrier system as it relates to suggested material types. Life cycle cost shall include the cost of expected future maintenance of various materials along with the initial capital cost of each material.

During 2019 Capital Budget deliberations, on the direction of Council through PHD 03-2019, staff submitted and Council approved an uninitiated business case entitled Transportation Infrastructure Means Protection - 20001038. Staff recommends initiating these approved funds in order to move forward with the detailed design, tender and construction of the means protection barriers.

In the six month period since October 2018, there have been six deaths by suicide at the location in question, as well as at least 1 additional serious attempt. With future deaths being a known probability as per updated assessment and recommendation by Dr. Hirji (Appendix 3), there is considerable risk with not installing the means protection barriers at this time.

Due to the extreme sensitivity of this project, and timeliness of erecting the means protection barriers being of significant importance (to address risk of additional deaths), staff are recommending that Parsons Inc. be directly retained to proceed with the detailed design and tender package creation in accordance with Niagara Region's Purchasing Bylaw. Parsons Inc. has extensive background and knowledge of StC-1, which will allow Niagara Region to proceed with the installation of means protection barriers in an expeditious manner. Staff have solicited a proposal from Parsons Inc. to complete this phase of the project and have received a proposed cost of \$141,626 (including 1.76% non-refundable HST). It is more than likely that Staff will retain Parsons Inc. to undertake contract administration and inspection services during the next phase of this work. Council should be aware that the award of contract administration and inspection services for the construction of StC-1 itself was also awarded to Parsons Inc. as a sole source procurement due to the criticality of the designer overseeing their design. The value of this previous work required and received Council approval.

Analysis

In January 2019 Niagara Region's Medical Officer of Health and Commissioner (Acting), M. Mustafa Hirji, brought forward a report to Public Health and Social Services Committee entitled *PHD 03-2019 Preventing Deaths by Suicide on Public Infrastructure* (PHD 03-2019D).

Council endorsement of recommendations in the above report directed staff to proceed with planning for means protection at StC-1.

In January 2019, staff retained Parsons Inc. to carry out a preliminary design report that would consider the feasibility of installing means protection on StC-1. The report would review similar structures that have means protection structures, and the various types of means protection that are feasible for the required application, the physical ability to retrofit means protection to the existing infrastructure, potential design parameters, materials options, along with their expected service life.

In late March 2019, staff received a completed TIMP report (Appendix 2). The highlights of the report are as follows:

- There are a number of examples throughout North America where various types of means protection have been installed and are performing as expected. A few locations are Burrard Street Bridge (Vancouver), Ironworkers Memorial Bridge (Surrey), Golden Gate Bridge (San Francisco), Prince Edward Viaduct (Toronto), High Level Bridge (Edmonton)
- Advantages and disadvantages of examples were provided
- Design options recommended for exterior barriers: 1. *Inclined barrier with cantilever pipes*, 2. *Inclined barriers with supported pickets*
- Design options recommended for interior barriers: 1. *Horizontal mesh at top of parapet*, 2. *Horizontal mesh at bottom of parapet*
- Materials options for means protection barrier construction
- Life cycle cost analysis of different construction materials

The TIMP report clearly concluded that retrofitting means protection to StC-1 was a feasible option.

In mid-March, staff attended a steel fabrication plant to view a full scale model of the two exterior barrier options considered viable in the TIMP report. Staff reviewed the scale models along with our consultant Parsons Inc. Upon conclusion of this site visit, it was evident that of the two options considered, one option (inclined barrier with cantilever pipes) was far more robust and appeared to better serve the intended purpose.

The major benefit of the inclined barrier with cantilever pipes was the robust cross section. The stability of this robust cross section required less bracing and a reduced need for bracing resulting in a design that is less scalable by persons. The scalability of the design is an important consideration as a less scalable design is more likely to deter persons from attempting to climb the means protection.

The interior barrier considerations are very similar in nature; however, the *horizontal mesh at top of parapet* has benefits related to installation and maintenance. The top mounted option is also more visible and will act to further deter potential scaling of the interior parapet wall.

Materials evaluated for construction of the means protection barriers were galvanized steel and aluminum.

Galvanized steel and aluminum are estimated to have a very similar initial capital cost. However, the longevity of galvanized steel is dependant on the quality and durability of its galvanizing and its ability to resist corrosion. Galvanized steel would require a more frequent maintenance program to ensure the full life expectancy of the asset is realized. Aluminum is resistant to corrosion. Aluminum oxidizes naturally and is extremely durable in our climate. It is expected that an aluminum barrier would have significantly less ongoing maintenance to reach its expected asset life. Galvanized steel is a much heavier material making dampening of the steel to control vibration more predictable. Galvanized steel has been widely used for similar applications thus making its performance highly predictable. Although there have been no identified cantilevered pipe means protection barriers constructed of aluminum, staff are recommending further analysis be conducted during detailed design to determine the feasibility of this option.

Life cycle cost analysis is a method for evaluating the initial capital cost of an asset along with the maintenance required to assist the asset in reaching its expected asset life before requiring replacement. Some materials will require a lower initial capital investment and have a higher long term maintenance cost while others will have a higher initial capital investment and a lower long term maintenance cost. When making a determination of the most financially responsible materials to use it is important to consider the long term cost of an asset including any maintenance required over the life of the asset.

When reviewing all of the variables and the life cycle cost analysis is clear that galvanized steel has a higher life cycle cost than aluminum (see TIMP report Appendix 2). Staff along with our consultant feel that it would be prudent to take advantage of the lower life cycle cost of utilizing aluminum. However, further detailed design is required to ensure that dampening the barrier to prevent vibration is possible in this application. During the detailed design stage the cost associated with dampening the aluminum barrier will be reviewed and if found that dampening the aluminum would not be cost adverse, staff will proceed with the design utilizing aluminum. If found that in this application, dampening the aluminum barrier is not possible or cost prohibitive staff will proceed with a galvanized steel barrier. Staff will report back to Council via Council Memo once a final material has been established, in order for Council to be aware of the expected final product.

Alternatives Reviewed

Means protection is part of a holistic approach to suicide prevention as detailed in the Prevention Report, and as is being proposed in PHD 08-2019.

Staff have reviewed alternatives for several types of means protection including but not limited to the following:

- Vertical Steel Rod Fence (Burrard Street Bridge)
- Vertical Galvanized Cantilever Pipes (Ironworkers Memorial Bridge) **Preferred**
- Netting Systems (Golden Gate Bridge)
- Vertical Barrier with Rods (Price Edward Viaduct)
- Horizontal Steel Cable Barrier (High Level Bridge)

The advantages and disadvantages of each type of means protection in the locations listed is detailed in the TIMP report attached as (Appendix “2”).

Relationship to Council Strategic Priorities

This report does not relate specifically to any of Council’s strategic priorities. Nonetheless, it addresses a matter of current public interest, and is pursuant to an approval and direction by Council through PHD 03-2019.

Other Pertinent Reports

PHD 03-2019 Preventing Deaths by Suicide on Public Infrastructure

Prepared by:

Frank Tassone, C.E.T.
Associate Director Transportation
Engineering
Public Works Department

Recommended by:

Catherine Habermehl
Acting Commissioner
Public Works Department

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was prepared in consultation with M. Mustafa Hirji, Medical Officer of Health & Commissioner (Acting) (Public Health and Emergency Services), Sardar Nabi, Program Director Bridges (Parsons), Catherine Habermehl, Acting Commissioner (Public Works), Ron Tripp, Acting CAO, Dan Ane, Manager Program Financial Support

Appendices

- | | | |
|------------|--|----------|
| Appendix 1 | PHD 03-2019 Preventing Deaths by Suicide on Public Infrastructure | |
| Appendix 2 | Transportation Infrastructure Means Protection | 43 pages |
| Appendix 3 | Update on Need for Means Protection on Infrastructure in St. Catharines (Memo to Pubic Works Committee by Dr. M. Mustafa Hirji, Medical Officer of Health & Commissioner (Acting)) | |

Subject: Preventing Deaths by Suicide on Public Infrastructure

Report to: Public Health & Social Services Committee

Report date: Tuesday, January 8, 2019

Recommendations

1. Regional Council as the Board of Health **RESOLVES** that current public discourse around suicide has caused contagion and **REQUESTS** local media and others with a public audience to adhere to the Canadian Psychiatry Association's 2017 "Media Guidelines for Suicide Reporting" to prevent further contagion of suicide
2. Regional Council as the Board of Health **ENDORSE** the proposed framework for preventing suicides on public infrastructure
3. Within this framework, Regional Council as the Board of Health **ENDORSE** the importance of considering a barrier at the location of multiple recent deaths by suicide and **DIRECT** staff to proceed with planning for such a barrier for installation in 2019, reporting back by spring 2019 with a final recommendation, detailed cost estimates, and budget options
4. To implement this framework, Regional Council as the Board of Health **DIRECT** staff to develop and report back in spring 2019 with detailed cost-estimates and budget options for:
 - a. Suicide identification/intervention training
 - b. Suicide risk assessment capacity-building
 - c. Support for a Mental Health Hub/Clubhouse in St. Catharines
5. To implement this framework, Regional Council **DIRECT** staff to engage with the Ministry of Transportation on opportunities for provincial funding to support a possible infrastructure barrier as in recommendation #2
6. As part of this framework, Regional Council **DIRECT** staff to include consideration of barriers on any future major infrastructure projects, and to include details of their consideration in reports to Council for approval of such projects

Key Facts

- Deaths by suicides increase in the days and weeks after widespread discourse or coverage of the details of a death by suicide. This "contagion" is usually characterized by deaths from the same or similar means, and often in the same location. To prevent contagion, many specifics have been omitted from this report.

- Niagara-wide, there are approximately 44 deaths from suicide each year. Of these, an average of 3.8 deaths from suicide each year can be attributed to a fall from a height.
- Since October 2018, there have been three deaths by suicide from a single public infrastructure element in St. Catharines, as well as at least one death from an analogous infrastructure element elsewhere. The latter three deaths all occurred within days of significant public discourse of a prior death by the same means, and were likely due to contagion.
- Historically, the infrastructure implicated has not been associated with deaths from suicide, emphasizing that public discourse fueling contagion is likely responsible. It is unknown if this location may now become a “suicide magnet” longer term or not.
- Scientific research on suicide prevention in public places points to five areas of activities that should be taken in concert:
 - Restricting or deterring access to the means of suicide
 - Increasing opportunities for individuals to seek help
 - Increasing probability of human intervention
 - Redefining the public image of a place to no longer be attractive as a place to die by suicide
 - Improving integration and access of the mental health services
- Niagara Region staff and partners have escalated activity and plans in all five of these areas since October 2018 in order to reduce deaths by suicide Niagara-wide.
- Regarding the first area, barriers on infrastructure have relatively strong scientific evidence of preventing deaths by suicide from falls from a height, without a proportional increase in deaths elsewhere.
- The two infrastructure elements most strongly associated with deaths by suicide from a fall from a height are at locations other than where recent deaths have occurred, and where in discussion with the jurisdiction owner, barriers would not be feasible.
- Addition of a barrier to the infrastructure implicated recently in St. Catharines would cost upwards of \$4 million and would take until late 2019 to be completed.

Financial Considerations

The proposed framework for suicide prevention on public infrastructure identifies several opportunities for enhanced work locally. The cost of such enhancements are included the table below.

Table 1. Framework to Prevent Suicides on Public Infrastructure and Possible Budget Implications

Area of Suicide Prevention	Activities	Local Enhancement	Estimated Capital Cost	Estimated Operating Cost
Restricting & Detering Means	Barrier on public infrastructure	Barrier at location of recent suicides in St. Catharines	Approximately \$4 million	
	Lighting	Review of lighting on infrastructure	\$TBD	
Increasing Opportunities for Help Seeking	Signs & crisis phones	Signs		\$TBD
	Staffed sanctuary	Implement HUB model or Clubhouse model in St. Catharines	\$TBD	Contribution toward \$700,000 cost
Increasing Probability of Intervention	Surveillance cameras	NRPS surveillance pilot	\$TBD	
	Increased patrols	Increase in patrols		\$TBD
	Suicide awareness & intervention training	ASIST & safeTALK training		\$300,000 over 2 years (1.5 FTE)
Redefining the Public Image	Media Portrayal	Engagement with media Digital engagement campaign		\$TBD
	Memorials	Relocation of memorials		\$TBD
Mental Health System	Increasing suicide risk assessment	Public Health & CAMH-led capacity building		\$67,500 over 2 years (0.5 FTE)
	Integration of mental health system	LHIN System Mapping		\$500,000 implementation

Public Health could increase training for suicide awareness and intervention with 150 people who regularly interact with mental health clients as well as 500 members of the public. As well, Public Health has a plan to build capacity among health care providers for increased risk assessments. Together, this would require 2 FTEs of work over 2 years, production of supplies, reimbursement of the Niagara Distress Centre for services, and hosting a community forum at a total cost of \$367,500.

Operating a mental health HUB or Clubhouse in St. Catharines would cost approximately \$700,000. Niagara Region could support a portion of these operating

costs. Alternately, the Region could consider support through acquiring and donating a physical facility as a capital expenditure.

The LHIN is embarking on mapping the mental health system locally to identify gaps and opportunities for improvement. Niagara Region could contribute to implementation of improvements identified, particularly as they relate to current services. A possible future budget of \$500,000 to implement these has been estimated. It is not recommended that any decisions be made to fund these until possible improvements have been identified.

None of the above estimates have been included in the 2019 operating or capital budgets, and/or previously approved budgets for Regional infrastructure. The Capital Variance Project provides funding for in-year capital project adjustments, and at this time \$5.8 million in capital variance project funding is available to support priority projects, including the One District Police Facility, a number of transportation related projects and the low end estimate for the barrier on public infrastructure noted above.

Once the detailed cost estimates are determined, a report to Council with those estimates will be provided as well as recommended sources of funding. Council approval is a requirement of a Capital Variance Project draw greater than \$1 million, and any further Capital Levy Reserve funding and/or an operating budget funding would required Council approval and a budget amendment.

Analysis

Contagion & Use of Language

Suicide “contagion” is the phenomenon where susceptible persons are influenced towards suicidal behaviour and certain suicide methods by learning of another’s suicide. This scientific finding has been validated many times: public discourse of a death, be it on social media, public fora, political debate, or traditional media can lead to an increase in deaths in the days and weeks after.¹ Additional suicides are most likely when there is/are

- greater volume or profile of discourse (e.g. front page coverage),
- descriptions that are specific and graphic (including the means of death and/or the location of death),
- descriptions of the victim in relatable terms,
- coverage of sympathy and concern towards the victim after the death, and
- ascribing simple or singular reasons for the death (e.g. was caused by bullying)

¹ Niederkrotenthaler T, Herberth A, Sonneck G. The "Werther-effect": legend or reality? *Neuropsychiatr.* 2007;21(4):284-90.

- language that implies action, control, or solution (e.g. “committed”, “successful” or “failed” attempt, “took their life”, prominent use of “suicide”)
- portrayal as achieving a result (e.g. relieving of pain/suffering; leading to peace or a “better place”; going to “heaven”; the act was quick, easy, and/or painless)

Research shows that when language and reporting avoids the above, contagion can be minimized (elimination of contagion requires there be no reporting).² As well, coverage that focuses on the opposite (e.g. other people who have overcome mental illness), it can lead to the opposite of contagion—a reduction in deaths by suicide in the days and weeks after.

In order to prevent this report, quotes taken therein, debate at Committee/Council, or subsequent coverage from contributing to contagion, language used in this report will sometimes be indirect and avoid specifics.

Statistics in Niagara

Statistics Canada’s Vital Statistics database is the established standard for examining causes of death. The most recent data release showed that in the 5 year period of 2008 to 2012, there were 222 deaths by suicide (average 44.4 deaths per year). Of these, on average,

- 18.2 deaths resulting from suspension from a cable,
- 9.8 deaths from a drug overdose,
- 3.8 deaths from a fall from a height,
- 3.2 deaths from chemical overdose,
- 3.0 deaths from firearms, and
- 1.8 deaths from sharp or blunt objects.

Examination of calls received by Emergency Medical Services data from 2016 to September of 2018 shows that call volumes related to suicide attempts and self-harm were stable from 2006 to 2015 (between 550 and 600 calls per year). There was an increase in calls thereafter with closer to 800 calls per year in 2016 to 2018. Part of this increase may be attributable to revised dispatch protocols during this time. It is unknown if more severe impacts from opioid use may be a contributor to this increase.

² Mark Sinyor, Ayal Schaffer, Yasunori Nishikawa, Donald A. Redelmeier, Thomas Niederkrotenthaler, Jitender Sareen, Anthony J. Levitt, Alex Kiss and Jane Pirkis. *CMAJ* July 30, 2018 190 (30) E900-E907; DOI: <https://doi.org/10.1503/cmaj.170698>

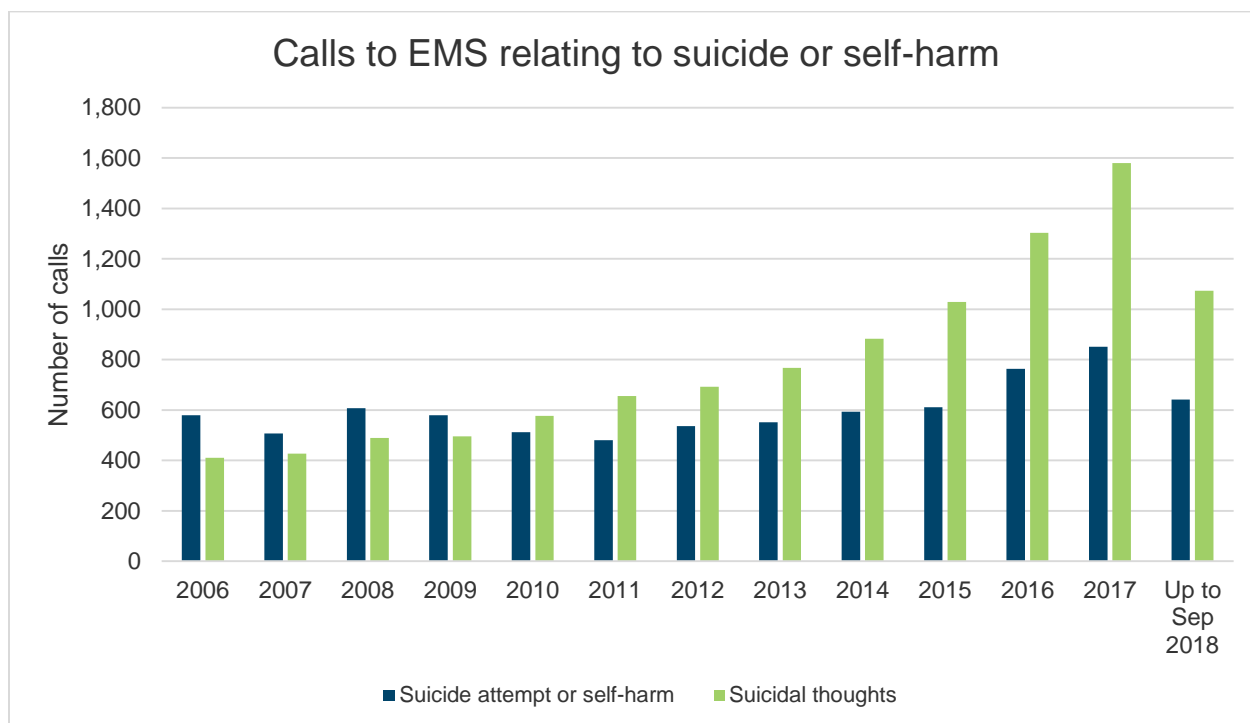


Figure 1 Calls to EMS relating to suicide or self-harm (2006 to September 2018)

Recent Events

In the three months since October 2018, there have been three deaths by suicide on an element of public infrastructure in St. Catharines, in addition to one reported attempt. As well, there has been at least 1 death at a similar infrastructure element elsewhere. Given the expected 3.8 deaths Niagara-wide per year from a fall from a height, 3 deaths in 3 months is unexpectedly high.

Under section 10 of the *Coroner's Act*, the Ontario Coroner's Office investigates every suspected death by suicide, and so has the most comprehensive and reliable data set. The coroner reported to us that they did not identify any deaths by suicide at this infrastructure between 2006 and 2017 (because the Coroner does not geocode investigations, their database query for deaths at this location was based on searching for place names, which is less accurate than geographical coordinates).

Data from Emergency Medical Services does not show any incident responses coded consistent with a death by or attempt of suicide at this infrastructure between 2010 and 2017 (EMS data is coded based on the 911 call, so if a response was not attributed to suicide or suicide attempt on the call, it would be missed by this database).

The lack of history of deaths by suicide at this location makes these recent deaths unusual. These deaths and the attempt all received significant discussion in the media, on-line, in political councils, and in public memorialization. This created significant risk of contagion. Indeed, all three of the later deaths occurred within 10 days of significant media coverage and public discourse of the earlier suicides, the highest risk period. The

reported attempt occurred within 18 days of such coverage. All of these are therefore likely attributable to a cycle of contagion, explaining the deviation from the historical norm.

In discussion with suicide experts, the three-month history is not enough to have confidence whether if this location will continue to have contagion-fuelled deaths by suicide, or if the cycle of contagion could end. However, there is certainly risk of the former.

Framework for Preventing Deaths by Suicide

Public Health England, the United Kingdom's scientific expert body on public health matters, published a guideline in November 2015 on preventing suicides in public places³. The guideline was based on a review of the scientific evidence, existing international guidelines, published and unpublished reports and policy documents, consultation with local governments worldwide, and interviews with survivors. The resulting guideline was pilot tested in local jurisdictions as well for revision prior to being published.

The guideline prioritizes action at the most frequently used places by individuals who die by suicide. A framework for prevention is outlined involving action in four areas of focus:

- Restricting and deterring individuals from the means of dying by suicide
- Increasing the opportunities for those in a public place who are contemplating dying by suicide to seek help
- Increasing the probability that persons can intervene with those intending to die by suicide in a public place
- Redefining the image of a public place where individuals die by suicide into one less attractive for this purpose

As suicide is complex, measures from multiple areas should be undertaken, ideally from all four, in order to be effective.

In addition, given the important role of the health care sector in diagnosing and treating mental illness before it progresses to suicidality, a fifth area of focus relating to this sector has been added to the framework

Below, the five areas are applied to publicly-accessible infrastructure in Niagara where deaths may occur from a fall from a height.

³ Dr Christabel Owens, Rebecca Hardwick, Nigel Charles and Dr Graham Watkinson at the University of Exeter Medical School. *Preventing suicides in public places: A practice resource*. 2015.

Restricting/Deterring the Means

Restricting/deterring the means has been identified as one of the most scientifically-supported measures for suicide prevention⁴. When dealing with deaths on public infrastructure that occur from a fall from a height, the major means restriction is a barrier or netting. Additional deterrents would include lighting.

Research consistently shows that barriers (henceforth assumed to include netting) are effective at preventing deaths by suicide from falls on infrastructure, and that the majority of these deaths do not simply redistribute to other locations, but are completely prevented.⁵⁶

The Ontario Coroner's Office was asked to identify the locations where deaths from suicide from a fall from a height are most common, and therefore where a barrier would be most impactful. The Coroner identified two locations (NF-1 and NF-2/NF-3 in Table 2). In addition, data was requested for the location of recent interest (StC-1). EMS responses for suicide and suicide attempts consistent with a fall from a height were also collected.

To supplement this, EMS data on responses to suicidal ideation by threatening to fall from a height was also reviewed. Data was limited to infrastructure widely used by the public (e.g. private residences, industrial buildings were excluded). Suicidal ideation rarely proceeds to death. Often it spurs individuals to treatment; other times it can be help-seeking for someone struggling to navigate the health care system. Nonetheless, suicidal ideation may highlight locations that are generally attractive for a suicide attempt.

A total of 44 locations had a suicide death, suicide attempt, or suicidal ideation associated with falling from a height from public infrastructure (Table 2).

As previously noted, location StC-1 has rarely seen deaths by suicide prior to 2018. Reviewing the EMS responses to suicidal ideation, however, StC-1 does seem to be the location with the most suicidal ideation, followed by NF-1 and NF-2.

It should be noted that after averaging less than 2 incidents per year at StC-1, in 2018 there have been 7 incidents up to December 14. This is likely due to contagion again.

With the history of the most deaths by suicides historically, NF-1 and NF-2/NF-3 are the best candidates for a barrier. Staff have informally engaged the jurisdiction owners for that infrastructure, however, barriers in those locations are deemed by them not to be feasible.

⁴ Jane Pirkis, Matthew J Spittal, Georgina Cox, Jo Robinson, Yee Tak Derek Cheung, and David Studdert. The effectiveness of structural interventions at suicide hotspots: a meta-analysis. *International Journal of Epidemiology* 2013;42:541–548. doi:10.1093/ije/dyt021

⁵ Pirkis et al. 2013.

⁶ Sinyor M, Schaffer A, Redelmeier DA, et al. Did the suicide barrier work after all? Revisiting the Bloor Viaduct natural experiment and its impact on suicide rates in Toronto. *BMJ Open* 2017;7:e015299. doi:10.1136/bmjopen-2016-015299

StC-1 has the most frequent suicidal ideation implying some greater potential for deaths from suicide to occur here, though only a 3 month history of frequent deaths.

The Region retained the original designer of the structure in St. Catharines to develop a barrier design that would be structurally and esthetically compatible. This work is ongoing. The order of magnitude cost estimate for a barrier along all exposed edges of the structure is \$4 million based on conceptual design and market intelligence. The design work continues, along with the refinement of the cost estimate and will be subject to a subsequent report to Council.

Given that, after consulting with suicide experts, there is uncertainty whether deaths from suicide due to ongoing contagion can be expected to continue at this location. There is therefore also uncertainty whether a barrier would be the best mental health intervention and the best use of taxpayer dollars, since there is a possibility that contagion will dissipate and deaths will stop occurring as was the case prior to 2018. However, if a barrier is not built but contagion does not dissipate, preventable deaths will continue.

To balance these imperatives, and given that a barrier cannot be erected until late 2019 at the earliest, it is recommended that planning for a barrier to be erected in late 2019 continue as a contingency. In the next several months, other suicide prevention efforts will continue. Based on the pattern of any further deaths over those months, a final recommendation on whether to build a barrier will be brought to Council in spring 2019.

The other means deterrent to suicide, lighting, does not appear to be a concern at StC-1 or NF-1 and NF-2/NF-3. Review of lighting in other locations can be pursued as part of the larger framework.

Table 2. Suicide deaths, attempts, and ideation associated with falls from a height from public infrastructure

Infrastructure Element	Deaths & Attempts (2010-2017)		Deaths & Attempts (2018)		Suicidal Ideation (EMS Responses)	
	Coroner (To Nov. 20)	EMS Calls	Coroner (To Nov. 20)	EMS Calls	2006–2017	2018 (To Dec.14)
NF-1	11	1	1		16	2
NF-2	10		0		7	
NF-3		1			2	
NF-4					3	1
NF-5				1	3	
NF-6		1			2	
NF-7					2	
NF-8					3	
NF-9						2
NF-10					1	
NF-11					1	
StC-1	0		3*	1	22	7
StC-2					1	
StC-3		1			4	
StC-4				1		1
StC-5					1	1
StC-6		1				1
StC-7					1	
StC-8		1			2	
StC-9		1				
StC-10					1	
StC-11		1			3	1
StC-12		1			2	4
StC-13		1			5	1
StC-14		1			1	
StC-15					2	
StC-16		1				
StC-17					1	
StC-18						1
Thorold-1					1	
Thorold-2		1				
Thorold-3						1
Thorold-4					1	
Thorold-5					1	3
Welland-1					4	1
Welland-2					2	
Welland-3					1	
Welland-4					1	
Welland-5					1	
Grimsby-1					1	
Grimsby-2					1	
Fort Erie-1					2	
NOTL-1					1	
PC-1						1

Increasing Opportunity for Help Seeking

Encouragement to seek help, even subtle ones, are often enough to help suicidal persons break from their plan. Research has shown this to be effective, though less so than means restrictions.⁷

Installing signs of where to seek help is one significant measure. In response to the deaths by suicide in October, signs were immediately put up in the area with the number to call the Niagara Distress Centre.

Crisis phones and automated messages are additional measures that have been effective in other jurisdictions.

One other opportunity for help seeking exists when there is a staffed “sanctuary” nearby to which individuals experiencing a crisis can attend. In downtown Welland, the Oak Centre has been developed according to the internationally-recognized Clubhouse Model. This model is predicated on those with mental illness helping each other, and then supplementing that with professional services to help clients build mental health and social integration skills. The International Centre for Clubhouse Development has found that admission to hospital, and hospital stays for clients are significantly reduced if someone is a Clubhouse member. Given the success of the model in Welland, there is interest by many in St. Catharines to develop a Clubhouse in this city as well. The Oak Centre is largely funded through the local LHIN and has a total budget of around \$700,000.

Another model that is being discussed locally are regional mental health HUBs. HUBs of this nature accept individuals in crisis, who would normally be taken to an emergency department. Instead, in a HUB, with no competing patients needing to see a caregiver, people with acute mental health or addictions issues can get immediate help, in a setting tailored with services they need, while simultaneously relieving pressure on overcrowded emergency departments. HUBs also engage with the community and other groups to raise awareness, build the community’s skills to foster social inclusion and mental wellness, and facilitate community-led responses to mental health issues.

The Suicide Prevention Coalition has recommended a HUB for St. Catharines as a top priority.

Increasing Probability of Persons to Intervene

Human interaction is very effective at deterring a person from dying by suicide. Where a location is having frequent deaths by suicide, human interaction can be increased by having additional patrols by emergency workers, as well as surveillance (e.g. by cameras) to trigger an intervention. The Niagara Regional Police Service (NRPS) has a raised level of awareness by front line patrol officers with respect to persons in crisis or experiencing suicidal thoughts, and has increased patrols in affected areas. The NRPS is piloting the use of closed circuit television (CCTV) to enhance its ability to respond to

⁷ Jane Pirkis, Lay San Too, Matthew J Spittal, Karolina Kryszynska, Jo Robinson, Yee Tak Derek Cheung. Interventions to reduce suicides at suicide hotspots: a systematic review and meta-analysis. *Lancet Psychiatry* 2015; 2: 994–1001

calls for service, including suicidal persons and persons in crisis in parts of St. Catharines where there have been recent deaths.

Research shows that there is no significant difference to interaction by a member of the public versus an emergency worker. However, given their greater numbers, it is usually more likely someone contemplating suicide will interact with a member of the public, rather than an emergency worker. However, people often lack the confidence to intervene, or the skill to recognize suicidal behaviour. Applied Suicide Intervention Skills Training (ASIST) is an internationally-recognized program for helping people gain the skills to recognize someone at risk of suicide, and to know how to intervene to support a suicidal person. A condensed version of this training is known as safeTALK.

Currently Public Health has staff who provide safeTALK in certain settings. As well, through the Niagara Distress Centre, Public Health has access to ASIST trainers. Public Health proposes to increase ASIST (targeting 150 of those working with mental health clients) and safeTALK training (targeting 500 members of the general public).

The Suicide Prevention Coalition currently ranks suicide identification/intervention training as one of its two key areas of focus.

Redefining the Public Image

The most important measure to decrease deaths by suicide in a public place is to end discourse that associates that location with suicide. This sentiment is reflected in how this report is written. Recognizing the disproportionate role the media play in spreading information, a half-day session was held with all local media outlets on November 16, 2018 to discuss the current public discourse and ways to shift it to better align with the Canadian Psychiatry Association's 2017 "Media Guidelines for Suicide Reporting". Public Health Communications along with Strategic Communications and the media are continuing to work on measures resulting from that meeting. The Suicide Prevention Coalition currently ranks shaping media report as its second key area of focus.

Mental health experts highlight that memorials and floral tributes after a death can associate a location's public image with suicide. This can lead to others dying by suicide in the same location. Experts recommended that memorials be removed "as quickly and sensitively as possible to prevent them building up, within two to three days at the most".⁸

In recognition of this, the memorials at the location where several recent deaths by suicide have occurred were removed in early December 2018 to reduce the risk of additional deaths by suicide. This, unfortunately, occurred much later than the "two or three days" recommended by experts. Attempts were made to remove the memorial at earlier dates. However, given public outpouring and attention prior attempts were aborted when it became clear their removal would generate controversy and more discussion of the location in association with suicide, exactly what would cause additional contagion. Going forward, staff hope to be able to adhere to the 2–3 day

⁸ PHE

expert recommendation if there are any additional unfortunate deaths. As well, a permanent memorial site is being made available by Public Health at the Glenridge Naturalization Area where another memorial already exists for mental health clients who have died by suicide.

One other means of redefining the public image of a location associated with suicide is to redecorate or landscape in order to change the location's feel to be more hopeful, and to less visible sections where one may die by suicide in relative privacy. Staff plan to be mindful of opportunities to undertake such changes, though it is not anticipated that this will be a significant activity.

Improving Supports in the Mental Health System

As the mental health sector has the greatest contact with those at risk of suicide, particularly those with the greatest risk and most severe illness, deaths from suicide may be preventable through better support for these patients.

Niagara Region Mental Health has developed a Suicide Risk Assessment Strategy to strengthen health service providers' abilities to identify those at risk of suicide so that they can receive needed care earlier in their course of illness. This strategy will be delivered over the next several years, though it could be accelerated with additional investment.

The LHIN is also considering engaging a consultant to map the mental health system to address difficulties in navigating the system, to identify gaps in service, and to enable its many parts to work as a more cohesive whole. As Niagara Region serves mental health clients, there may be opportunities to implement recommendations from this exercise here. However, given that our mental health program is generally not supported through municipal levy funding, it would be a variation from past practice to do so. Until concrete proposals for change are available, staff do not recommend investing in this.

Alternatives Reviewed

As suicide affects all of Niagara and many means beyond falls from a height, the report has examined suicide holistically and Niagara-wide, rather than focused only on the location of recent interest.

Staff recommend a comprehensive approach to suicide prevention, rather than focusing on a single measure, as multi-factorial action has been shown in research to be most effective.

Recommending a barrier on the recent location of interest could have been proposed, but this was deemed to be premature given the lack of certainty that contagion will continue. However, recommending against a barrier would be imprudent given the risk that deaths by suicide might continue. The recommendation to continue working towards a barrier but deferring a final decision preserves the same opportunity to prevent suicide deaths, while also being fiscally prudent.



Media Guidelines for Reporting on Suicide: 2017 Update of the Canadian Psychiatric Association Policy Paper

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This paper has been substantially revised by the Canadian Psychiatric Association's Research Committee and approved for republication by the CPA's Board of Directors on May 3, 2017. The original policy paper¹ was developed by the Scientific and Research Affairs Standing Committee and approved by the Board of Directors on November 10, 2008.

Summary

A substantial body of research suggests that media reports about people who have died by suicide, as well as the topic of suicide in general, can influence vulnerable people and is associated with higher subsequent rates of suicide. Emerging evidence also suggests that reports about people overcoming suicidal crises may lower

suicide rates. The original 2009 Canadian Psychiatric Association (CPA) policy paper on media reporting of suicide¹ led to meaningful discussion between mental health professionals and journalists in Canada. This second iteration of the policy paper reviews the most up-to-date evidence relating to media reporting and suicide, and updates recommendations with more direct

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Note: It is the policy of the Canadian Psychiatric Association to review each position paper, policy statement and clinical practice guideline every five years after publication or last review. Any such document that has been published more than five years ago and does not explicitly state it has been reviewed and retained as an official document of the CPA, either with revisions or as originally published, should be considered as a historical reference document only.

engagement and input from the journalism community. Recommendations are meant as a guide for all relevant stakeholders, including journalists, editors, producers, journalism educators, researchers, policy makers, mental health professionals, and social media platforms. The paper suggests a framework for approaching suicide-related coverage and outlines potentially harmful and helpful aspects of reporting that should be avoided and included, respectively. Recommendations include using appropriate language, trying to reduce the stigma around mental disorders, and providing information about alternatives to suicide. Pertinent resources for people contemplating suicide, such as crisis services, should also be provided and can be directly linked to reports that appear online. Simplistic or glorified depictions of suicide should be avoided, and suicide should not be presented as a way of solving problems. Reports should avoid details of suicide methods, particularly if they are novel or unusual. Recommendations also include that, where possible, suicide should be covered by or with the input of health reporters who are best positioned to contextualize suicide within the broader topic of mental health. The paper also makes preliminary recommendations for social media and suggests collaboration with online platforms to help establish organizational standards concerning the dissemination of information about suicide.

Introduction

Scientific evidence from numerous natural experiments worldwide demonstrates that media reporting of suicide can sometimes result in contagion, with increased suicide rates across a population.²⁻¹² The association has satisfied the criteria of consistency, strength, temporality, specificity, and coherence required to conclude that there is a causal relationship.¹³⁻¹⁴ The research evidence indicates that, in general, more suicide deaths occur following repetitive reporting of suicide.⁵⁻⁶ This relationship is widely known as the Werther Effect, a reference to a 1774 novella published by Goethe describing the death by suicide of a young man who was rejected by the young woman he loved.² This suicide contagion effect is thought to be mediated by social learning, whereby a vulnerable person identifies with people depicted in the media and may be more apt to copy their suicidal behaviour and subsequently die by suicide.^{5-7,15-16} The effect may be particularly pronounced for youth, a group that can be more susceptible to social learning,¹⁷⁻²² and in cases where the media report relates to a celebrity, whose behaviour people may be more prone to emulate.^{4,12,16,23-27} In contrast, the effect

does not seem to occur if the person who died by suicide was a criminal.¹⁶ Although the best evidence in this area comes from large, population-based, natural experiments, where it is challenging to prove exposure to media reports, findings from psychological autopsy studies, reviews of suicide notes, and interviews with people who have attempted suicide show that many have or were exposed to suicide-related media content, which influenced suicidal behaviour.^{8,28-34} More recently, Niederkrotenthaler et al. postulated a corollary effect to the Werther Effect called the Papageno Effect, whereby media reporting emphasizing a positive outcome of a suicidal crisis may be associated with lower subsequent suicide rates.⁵ This was based on a latent class analysis examining media and suicide reporting in Austria. The authors found that articles stressing “mastery of crisis,” in which people contemplating suicide employed adaptive coping strategies rather than suicidal behaviour, were associated with a subsequent decrease in the rates of suicide.⁵ The “active ingredients” of reporting that mediate contagion of suicide and adaptive behaviour are not fully understood; however, there is general consensus on putatively harmful and protective aspects of media reporting, and these form the basis for media guidelines.

Guidelines for responsible media reporting of suicide have been developed across numerous countries and jurisdictions worldwide.³⁵⁻³⁸ Several guidelines have been produced in Canada, including those from the Canadian Psychiatric Association,¹ the Canadian Association for Suicide Prevention (CASP),³⁹ and the Mindset guidelines developed by journalists themselves.⁴⁰ Media guidelines have demonstrable impact on the quality of reporting on suicide⁴¹⁻⁴⁴ and, in some cases, have been associated with lower suicide rates.^{42,45} It is estimated that guidelines can prevent more than 1% of suicide deaths; such a reduction in Canada would translate to the prevention of more than 40 deaths per year across the country.⁴⁶⁻⁴⁷ Canadian studies examining media reporting—in general and per the guidelines above—are limited. A recent study examining adherence to Mindset’s 14 specific recommendations in the aftermath of a celebrity suicide found that most recommendations were followed (range of adherence was 65% to 99% of articles), except for the recommendation to tell people considering suicide how they can get help (present in only 27% of articles).⁴⁸

The original CPA position paper on media reporting and suicide¹ garnered controversy from some who expressed scepticism about the evidence base for suicide contagion,⁴⁹ and argued that perceived efforts to suppress suicide-related stories are counter-productive.⁵⁰ In the interim, there has been increased engagement

between mental health professionals and the media via informal dialogue surrounding specific reports, through symposia at the CPA annual meeting, and during and after Canada's first media forum for suicide prevention, held in Toronto in November, 2015.⁴⁹ In part due to a greater public desire for information about mental health, journalists are increasingly interested in covering issues related to mental health, including suicide, in a respectful and destigmatizing manner.⁴⁹ Most suicide deaths are not newsworthy and the media are sensitive to concerns about contagion; however, deciding when and how to cover suicide is a delicate balancing act.⁴⁹ Rather than telling journalists how to do their jobs, consensus is that the mental health community needs to work collaboratively with the media and provide them with the best available information to make those difficult decisions, and to provide context and help mitigate risks of contagion when the decision is to proceed with a report.^{36,39,49}

One relatively new aspect to this discussion is the proliferation of social media and the implications for media guidelines on reporting suicide.⁵¹⁻⁵² There are significant concerns about pro-suicide content, which accounts for a substantial proportion of suicide related-information online,⁵³⁻⁵⁴ and that users may use social media to learn about suicide,⁵⁵⁻⁵⁶ disseminate suicide methods,⁵⁷⁻⁵⁸ normalize and desensitize people to self-injurious behaviour,⁵⁹ and publish suicide notes.⁶⁰⁻⁶¹ Social media sites also provide opportunities for prevention through learning about alternatives to suicide, resources for getting help, and for access to peers who have mastered suicidal crises.^{52,62} Some platforms have developed built-in responses in which, for example, queries about suicide prompt the display of prevention resources or where users can report concerns about people who may be expressing suicidal ideation.^{52,62-64} It has been suggested that, in the age of the internet, media guidelines may be impractical or irrelevant given the difficulty inherent in trying to constrain or regulate billions of comments and postings.⁶⁵ However, there is general agreement that social media sites should facilitate access to health information and resources for people contemplating suicide.⁶⁵⁻⁶⁶ Furthermore, studies show that the traditional media commonly uses social networking sites like Facebook and Twitter to inform their coverage and, likewise, their coverage can influence social media.⁵¹ This bidirectional relationship suggests that the approach of the traditional media to covering suicide is likely to have some impact on how it is depicted in social media.

The goals of this updated policy paper are 1) to increase engagement with the journalism community and to adjust previous recommendations collaboratively with journalists; 2) where possible, to achieve consistency between CPA recommendations and recent Canadian and international guidelines; and 3) to address the challenging issue of recommendations in the context of new online and social media. The recommendations below stem from a careful review of the available literature and of Canadian and international guidelines, as well as discussion with journalists and mental health professionals.

Recommendations for Traditional Media Coverage

Table 1 outlines in detail the recommended approach to developing a suicide-related report. Table 2 describes specific elements to be avoided and included, respectively, in media reports. We highlight 3 of these recommendations for special attention:

1. Health reporters, not crime reporters, are best positioned to cover suicides.

A key element of these recommendations is that, as much as possible, suicide be covered by health reporters rather than crime reporters or other journalists. The notion that suicide is a crime rather than the result of a mental disorder is archaic. Crime reporting often includes graphic details of the suicide to make reports more exciting and sensationalistic. Such detailed reporting for suicide coverage is inappropriate and may promote contagion. Health journalists have the greatest awareness of the complex issues surrounding suicide reporting and are therefore best positioned to cover the topic. We acknowledge that there may be situations where other journalists, such as sports, entertainment, or financial reporters, may want to cover suicide deaths in their areas; however, we recommend that they do so cautiously, paying attention to these guidelines, and we suggest they consult with their health reporter colleagues about suicide-related content.

2. Reports should generally avoid details of suicide methods, especially when unusual or novel methods are involved.

There is growing evidence that media reporting on novel methods of suicide has led to dramatic increases in suicide deaths by these methods and in overall suicide rates in various areas of the world.⁶⁷⁻⁷⁰ Whereas media reports should generally avoid details of suicide methods, as these can lead to contagion effects, such an effect may be particularly pronounced when unusual

Table 1. Factors for Journalists and Editors/Producers to Consider Before Covering Suicide-Related Content

1. Weigh the story's newsworthiness and the public's need to be informed with potential harm related to contagion.
 - Be familiar with your organizational guidelines relating to reporting on suicide.
 - If the decision is to proceed with coverage, plan and/or discuss how harm might be minimized.
 - Seek advice from suicide prevention experts.
 - Be especially cautious when reporting on celebrity or youth suicide deaths, as these currently have the strongest evidence for contagion.
 - Consider how a vulnerable person may identify with the suicidal behaviour/people depicted, and consider steps that might minimize this.
2. Consider the impact of the report on:
 - those thinking of suicide or potentially at-risk for suicide,
 - those bereaved by suicide, including attention to respect for their privacy and grief,
 - the journalist who is reporting the story.
3. Consider the appropriate approach/format.
 - Suicide reporting should generally be done by health reporters rather than other journalists (e.g., crime reporters), as they are best positioned to contextualize the issue within the broader topic of mental health; if other journalists do report, they should at least consult with guidelines and/or health reporter colleagues.
 - Where possible, long-form reporting is recommended, as it allows journalists the opportunity for nuanced discussion and may avoid presenting the causes of suicide in an overly simplistic fashion.

Table 2. Recommendations for Potentially Harmful Elements of Media Reporting that Should Be Avoided and Potentially Helpful Elements to Include

Avoid	Include
<ol style="list-style-type: none"> 1. Prominent coverage, including <ul style="list-style-type: none"> • front page/lead story coverage • prominent photos of the deceased or loved ones or people engaged in suicidal behaviour 2. Graphic or sensational depictions 3. Excessive detail, including <ul style="list-style-type: none"> • details or photos of the method and/or location; particularly avoid reporting novel or uncommon methods • glorifying or glamourizing either the person or the act of suicide in a way that might lead others to identify with them • the content of suicide notes 4. Repetitive or excessive coverage^a 5. Inappropriate use of language, including <ul style="list-style-type: none"> • the word "suicide" in the headline • "commit" or "committed" suicide^b • "successful/unsuccessful" or "failed" attempts 6. Simplistic or superficial reasons for the suicide (i.e., suicide as arising from a single cause or event, such as blaming social media for suicide) 7. Portraying suicide as achieving results and solving problems <ul style="list-style-type: none"> • do not describe suicidal behaviour as quick, easy, painless, certain to result in death, or relieving suffering/leading to peace ("in a better place") 	<ol style="list-style-type: none"> 1. Appropriate language (e.g., "he died by suicide" or "her suicide death") 2. Reporting that reduces stigma about mental disorders/seeking mental healthcare, and that challenges common myths about suicide <ul style="list-style-type: none"> • refer to research linking mental disorders with suicide • highlight that mental disorders are treatable and therefore that suicide is preventable • highlight the tragedy of suicide (i.e., describe it in terms of a lost opportunity for someone suffering to have received help) • seek advice from suicide prevention experts and consider including quotes on causes and treatments 3. Alternatives to suicide (i.e., treatment) <ul style="list-style-type: none"> • include community resource information, such as websites or hotlines, for those with suicidal thoughts • where possible, list or link to a list of options including reaching out to a trusted family or community member, speaking to a physician or health care provider, seeking counselling/talk therapy, calling a hotline/911, or going to a nearby emergency department • where possible, cite examples of a positive outcome of a suicidal crisis (i.e., calling a suicide hotline) • embed emergency resource links/banners (for online content) 4. Information for relatives and friends, such as <ul style="list-style-type: none"> • warning signs of suicidal behaviour • how to approach, support and protect a suicidal person

^aWe acknowledge that suicide death of prominent figures will invariably result in serial coverage but urge journalists to nevertheless weigh the need for additional stories.

^b"Commit" evokes a crime, since suicide was historically criminalized; however, this terminology is not consistent with the modern understanding of suicide evolving from a treatable disorder.

or novel methods of suicide are involved. Therefore, publicizing these details should be avoided.

3. Emergency resource links should be included in all articles that deal with suicide.

Guidelines universally advise the media to provide resources, such as crisis lines, to people contemplating suicide. Online platforms afford an opportunity to go a step further. Reports themselves can be accompanied by embedded links to crisis services to facilitate access, thereby decreasing barriers to help-seeking.

Recommendations for Social Media

As described, this is largely uncharted territory in Canada and throughout the world. The recommendations below are meant to be a starting point, with the intention that future iterations of the CPA policy paper will refine and expand on them with input from social media organizations.

We recommend:

1. A novel collaboration between Canadian mental health professionals and social media organizations. Just as journalists are the experts in their area and must take a leadership role in responsible reporting of suicide, those best positioned to address suicide on social media are the designers of the social media sites themselves. In replicating efforts that have been successful with the traditional media, the CPA and mental health professionals should organize meetings, symposia, and forums to address the topic of suicide collaboratively with social media stakeholders.
2. Social media organizations consider the degree to which they might be used as a platform for suicide prevention. Specific efforts may include 1) providing information and resources to people who make suicide-related queries or posts, 2) including “panic buttons” that allow for rapid access to crisis services/hotlines, 3) providing mechanisms for users to report if they are concerned about someone with the possibility for rapid intervention, and 4) moderating forums that frequently include suicide-related postings and making sure to remove inappropriate posts.

Recommendations for Dissemination of Guidelines

Evidence from other countries suggests that media guidelines work best when there is ongoing collaboration between suicide prevention experts, journalists, journalism schools, and public health policy experts.³⁹

We recommend:

1. Ongoing collaboration between journalists and mental health professionals, acknowledging scientific evidence and the autonomy of journalists.
2. All journalism schools include teaching of how to report responsibly and respectfully on the topic of suicide, including attention to issues related to ethics and social justice.
3. Media training for mental health professionals who are likely to be called on to comment on suicide in the press.
4. Education for policy-makers and other prominent figures who may be asked to comment publicly on the topic of suicide.

Conclusions & Future Directions

These recommendations mainly rely on data from large, natural experiments, which must be interpreted with a note of caution. Nevertheless, the weight of evidence suggests that certain types of media reporting, particularly those that glamorize suicide or a person who has died by suicide, can and do influence some people to die by suicide. Similarly, reporting that describes people overcoming suicidal crises and finding other solutions may encourage help seeking and more adaptive coping strategies. Further high-quality research is needed to identify which putatively harmful and protective elements of media reports mediate risk and confer benefit, respectively. More studies on the influence of media reporting in Canada and the impact of social media on suicide are also needed. The Canadian Psychiatric Association and mental health professionals across Canada are committed to helping the media make informed decisions about when and how to report on suicide. These efforts will ideally involve collaborative partnerships among all stakeholders, including mental health professionals, members of the media, individuals with lived experience, and all those touched by suicide. These ongoing collaborations, and future efforts that also include social media platforms, will provide the best opportunity to address this important issue.

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Transportation Infrastructure Means Protection

Concept Design Report

The Regional Municipality of Niagara
Public Works Department

1815 Sir Isaac Brock Way
Thorold, ON L2V 4T7
905-980-6000

HELP IS AVAILABLE

If you or someone you know is experiencing depression or showing signs of suicide risk, seek help as soon as possible. There is always support available. You are not alone.

Distress Centre Niagara

Free, Confidential, 24/7 Support

St. Catharines: (905) 688-3711

Port Colborne/Welland: (905) 734-1212

Beamsville/Grimsby: (905) 563-6674

Fort Erie: (905) 382-0689

If you are in crisis and require emergency assistance, please go to the nearest hospital or call 911.

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1.0 INTRODUCTION

1.1 EXISTING BRIDGE

The Burgoyne Bridge is located in the City of St. Catharines and carries Regional Road 81 (St. Paul Street West) over Twelve Mile Creek and Highway 406. The new 333-meter-long structure was completed in September 2017 and replaced the original Burgoyne Bridge which was constructed in 1915. The bridge serves as an important link between downtown St. Catharines and the western portion of the city and is oriented in the north-south direction. The span arrangement consists of seven spans of 30m, 42m, 42m, 44m, 125m, 30m, and 20m from south to north, with the 125m main span being supported by a centrally mounted steel tri-chord arch. The bridge is supported on reinforced concrete abutments and piers sitting on reinforced concrete caisson foundations. Figure 1.1 shows the general plan and elevation arrangement of the new Burgoyne Bridge. **Appendix A** includes the full general arrangement drawing for the Burgoyne Bridge.

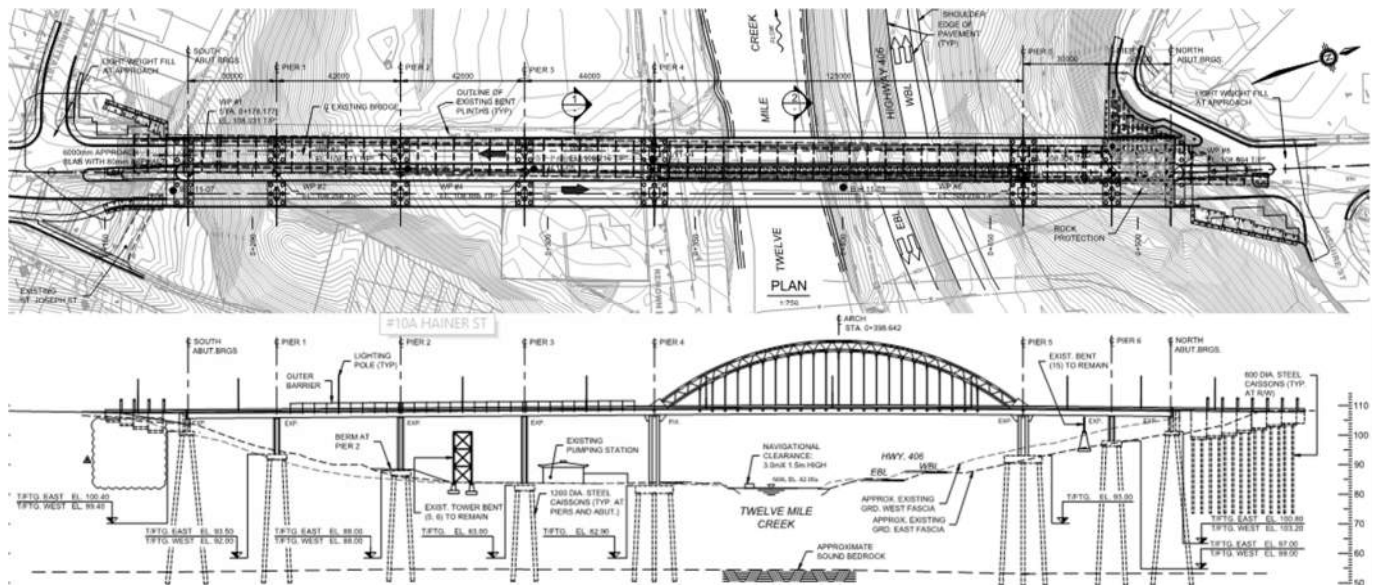


Figure 1.1 – Burgoyne Bridge Plan and Elevation

The cross section of the Burgoyne Bridge is in the form of a twin-deck structure making use of 2 parallel continuous composite trapezoidal box girders running the full length of the bridge. Each deck consists of 0.3m wide parapet walls, a 2.4m wide sidewalk, a 1.6m bike lane, a 3.5m traffic lane, and a 0.9m wide shoulder. The northbound and southbound decks are separated by a 5.5m gap over the entire bridge length. A series of floor beams and inclined hanger cables are utilized over the main span to transfer loads from the decks to the arch system. In addition, the main span has both lateral and longitudinal prestressed cables to increase the stiffness of the span and support the arch system. Figure 1.2 outlines a typical cross section for both the arch span and non-arch spans. **Appendix A** includes the full general arrangement drawing for the Burgoyne Bridge.

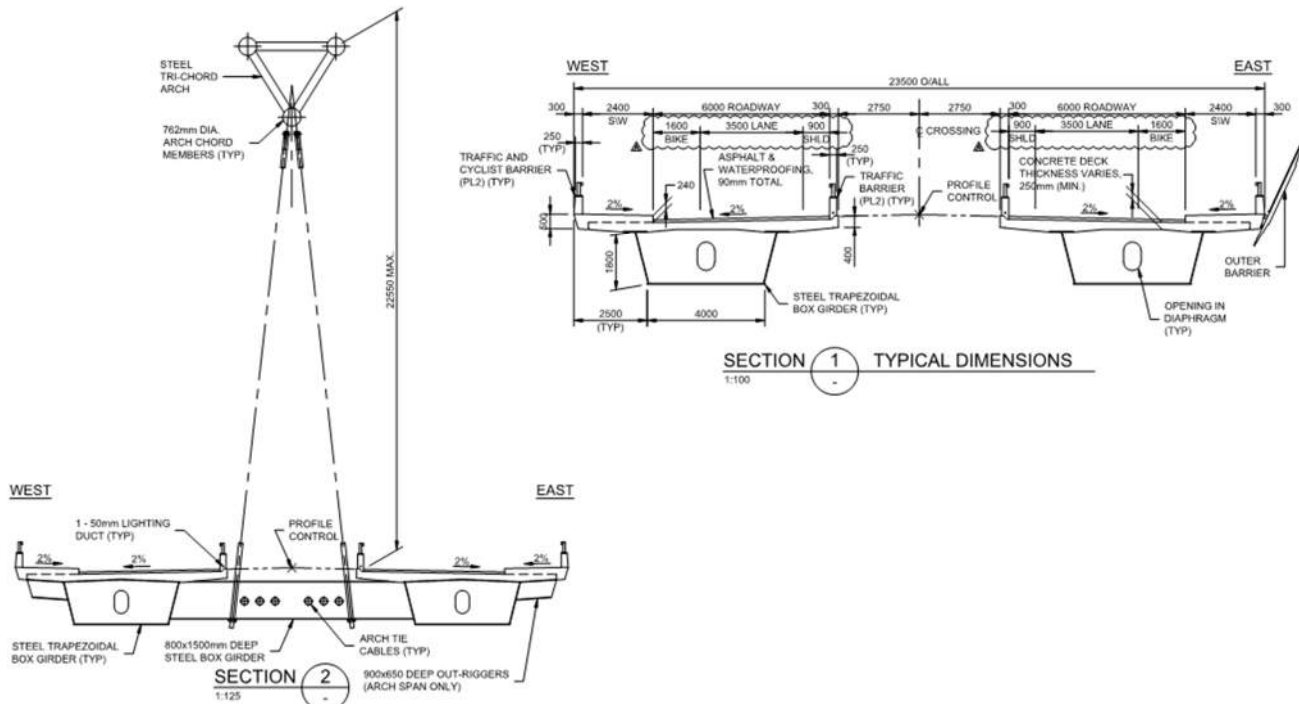


Figure 1.2 – Burgoyne Bridge Cross Sections

1.2 MEANS PREVENTION

Parsons has been contracted by the Regional Municipality of Niagara (the “Region”) Public Works Department to investigate possible means prevention measures following several deaths by suicide and similar attempts from the Burgoyne Bridge. Means prevention refers to the action of preventing or blocking the ability of a person to die by suicide through various direct and indirect methods. Examples of means prevention include barriers, nets, and the complete removal of pedestrian access. Such measures vary between encouraging a person contemplating suicide to seek help, to physically removing the ability for such a person to die by suicide. Deaths by suicide from a bridge is a world-wide concern, with fatalities occurring at many landmark structures, which become known as suicide “magnets”. This means that once a structure becomes known as a magnet, suicide contagion may result in an increasing number of deaths from the bridge. It is crucial that a system be put in place to prevent such notoriety and to remove the attraction of the bridge to persons contemplating suicide (Toronto Public Health, 2018).

Generally, physical barriers are considered the most effective means of preventing deaths by suicide as they restrict one’s ability to make an attempt as well as provide a sense of imperviousness which may help to reduce the “ease” of dying by suicide (Draper, 2017). This report will focus on comparing different types of barrier solutions for the Burgoyne Bridge and make recommend an effective solution. It should also be noted that the Region may add supplementary measures to the bridge in the form of signage, help phones, or security cameras. These methods have only shown weak statistical evidence of effectiveness in reducing the rate of suicides, particularly if implemented on their own. However, they may be useful to supplement a barrier system as a means to encourage a suicidal person to seek help (Toronto Public Health, 2018).

When discussing deaths by suicide from bridges, it is important also to consider the concepts of displacement and substitution. Suicide displacement is the idea that a person contemplating suicide who is blocked from dying at a certain bridge may look for other, nearby structures instead. Suicide substitution is similar in concept, wherein a person may seek another method of dying by suicide. Adding means prevention barriers may reduce or eliminate the rate of deaths by suicide at a specific bridge, but that does not guarantee that the overall deaths from falling from a height (or any other means) will be reduced. Research has shown that at some locations there has been a partial counterbalancing at nearby bridges

immediately following a barrier installation in which the deaths by suicide increases at these bridges. This temporary displacement is then followed by a long-term stabilization and reduction in the overall death by suicide rate in the area. Comparatively, research has indicated that at other locations there have been no signs of displacement or substitution after a means prevention barrier was installed, therefore reducing the overall deaths by suicide (Draper, 2017). However, the most important takeaway is that there is no guarantee that all deaths by suicide from the Burgoyne Bridge, nearby bridges, or by any other means will be completely prevented after the implementation of a means prevention barrier.

1.3 BARRIERS ON THE BURGOYNE BRIDGE

It is understood the Region is proposing a barrier system on the Burgoyne Bridge as a means to prevent deaths by suicide from the structure. On the exterior sides of the bridge decks the Region has expressed an interest in a barrier that will match the profile and appearance of the existing debris fence located on the south east edge of the east bridge deck as pictured in Figure 1.3. Additionally, the inner gap between the two bridge decks will also need to be blocked. There are two possible methods to provide means prevention between the decks. Firstly, to provide a barrier which is similar to the exterior means prevention barrier, and secondly, through the addition of a horizontal steel mesh system on the interior edges of the bridge decks, spanning the existing gap between them, as shown in Figure 1.4.



Figure 1.3 – Existing Debris Barrier



Figure 1.4 – Existing Gap Between Bridge Decks

It is understood that the optimal solution will be one that minimizes the visual impacts to the structure while simultaneously simplifying construction through the incorporation of the existing bridge features. Due to the unique design and complexity of the existing traffic, pedestrian, and bicycle railing systems on the Burgoyne Bridge, it is preferable to minimize impact to their design and functionality wherever possible.

This report will investigate the advantages and disadvantages of similar systems installed at other bridge locations and will apply the knowledge gained from these case studies to develop alternatives for both the interior and exterior means prevention barriers on the Burgoyne Bridge. The primary goal is to identify feasible solutions which will help to reduce deaths by suicide from the bridge while also minimizing the aesthetic impacts and not impede the current ease of access for vehicles, pedestrians, and cyclists. It is very important to understand that there is no solution which will fully remove the risk of deaths by suicide from the Burgoyne Bridge. Even the most comprehensive and expensive systems installed at other bridges have had reported deaths since the implementation of a means prevention barrier. It is crucial that the Region and the Public are aware that there is still a chance of deaths by suicide from the Burgoyne Bridge, even after a barrier is installed.

2.0 STATE OF PRACTICE

In recent years, much focus has been put on researching and understanding mental health issues and the reasons why a person would choose to fall from a tall structure. Combined with a push in refurbishing existing structures with means prevention systems and also incorporating such measures into the design of new bridges, many different means prevention applications can be found. Specifically, means prevention in the form of barriers has been shown to be the preferred method of preventing deaths by suicide, both in Canada and throughout the world. Few examples of netting systems exist and are typically only implemented when there are large concerns from the Public regarding the aesthetic impacts of a traditional deck-mounted barrier. Many of these examples also have signs, security cameras, and help phones installed in addition to barriers. It is inconclusive whether or not these steps reduce the rate of suicide attempts at a site and are mostly regarded as optional, supplementary measures that may be considered. These items may be added to the structure with relative ease if the Region would find it beneficial, however an analysis of such measures is excluded from this report as they do not address the immediate issue of means restriction.

This section will discuss the different types of barriers installed at various bridges and the advantages and disadvantages with each unique system. The information gained from analyzing the barriers on other structures is critical in identifying what design aspects should and should not be included in the proposed Burgoyne Bridge means prevention barrier alternatives.

2.1 BURRARD STREET BRIDGE, VANCOUVER

Located in Vancouver, British Columbia, the Burrard Street Bridge is an 836m long steel truss bridge built in 1932. The area is known for having a high rate of deaths by suicides, with many deaths occurring from the bridge and others nearby. To address this issue, the City of Vancouver elected to retrofit the bridge with a means prevention barrier as shown in Figure 2.1. The barrier is a vertical steel rod fence mounted on top of the existing concrete parapet wall. The barrier was reported to cost \$3.5 million and was constructed as part of a larger rehabilitation operation (Brown, 2016). A Public consultation was held to narrow down the options and find a solution that worked for both the City and the Public. Netting, glass, and mesh fencing were all considered, but were deemed to be too costly or too detrimental to the appearance of the bridge. The selected design was decided to be optimal for visibility, construction, and maintenance (Toronto, 2018).



Figure 2.1 – Burrard Street Bridge Barrier (City of Vancouver, 2017)

Advantages

The simple picket design minimizes view obstructions while mimicking the architectural features of the heritage structure. The design also incorporates concrete elements into the barrier system to enforce the image of consistency with the rest of the bridge. Horizontal members near the top of the fence provide an upper connection point for the pickets. This allows a thinner steel rod to be used, saving cost and weight while minimizing impacts to the view. Additionally, the staggered picket detail at the top has the dual purpose of matching the style of the existing bridge while also making it difficult for a person to climb over top of the fence. This design is easy to construct and minimizes construction and schedule costs by utilizing the existing bridge parapets.

Disadvantages

As a result of the decision to incorporate the existing parapet walls into the barrier design, a person has the ability to stand on top of the concrete parapets and light pole pedestals due to the fence being thinner than the concrete components it sits on. Additionally, gaps in the pickets at the concrete light pedestals may provide an opportunity to bypass the spike feature at the top of the pickets. Also, the horizontal member near the top of the fence may be too near to the top of the barrier to prevent someone from lifting themselves over the cantilevered bars. Similarly, the flat tops of the barrier support posts may provide a handhold to bypass the pickets. Combined with the ability to stand on top of the parapets, these hand holds may reduce the ability of the fence to stop climbers. Finally, due to the minimalist design and thinness of the vertical pickets, this barrier system does not give the same illusion of imperviousness that other options may provide.

2.2 IRONWORKERS MEMORIAL BRIDGE, SURREY

Located near the Burrard Street Bridge in Vancouver, British Columbia, the Ironworkers Memorial Bridge is a 1292m long steel truss cantilever bridge built in 1957, which carries 6 lanes of traffic over the Burrard Inlet. Similar to the Burrard Bridge, a high number of deaths by suicide from the Ironworkers Bridge necessitated that a means prevention barrier be installed. The \$10 million project (Saltman, 2017) consists of a vertical galvanized cantilevered pipe barrier acting as both a means prevention barrier and a pedestrian and cyclist guardrail. Refer to Figures 2.2 and 2.3 for details.



Figure 2.2 – Ironworkers Memorial Bridge Barrier (Saltman, 2017)



Figure 2.3 – Ironworkers Memorial Bridge Barrier (Ironworkers, 2018)

Advantages

The Ironworkers Memorial Bridge barrier primarily consists of vertical cantilevered steel pipes. By designing the vertical members to be cantilevered, no horizontal components are required near the top of the barrier which may otherwise provide a handhold for anyone attempting to climb it. The larger member size is also very resistant to any bending, and the size and height of the barrier gives a good sense of imperviousness to detract anyone from attempting to climb. The sidewalks were extended as part of a rehabilitation project, so there were no requirements to tie into the existing parapet walls. This reduces the number of footholds and allows the barrier to be continuous from top to bottom along the entire

bridge. Additionally, the tops of the cantilevered pipes are cut at an angle away from the deck to prevent them from becoming a handhold. No deaths have been reported since the barrier was constructed.

Disadvantages

The largest concern for the Ironworkers Memorial Bridge barrier is the larger view obstruction when compared to a picket style barrier. To allow for the cantilevered design, larger vertical components must be used which will further block the view, particularly at steep angles (refer to Figure 2.2 above). Consequently, no design considerations appear to have been put into the barrier to maintain the architectural style of the existing bridge. As such, the barrier is very obvious and intrusive when viewing the structure. Additionally, a cantilevered pipe design may prove to be heavier and potentially more expensive than a lighter picket design such as the one used on the Burrard Bridge. Finally, the pedestrian and cyclist railings mounted to the inside face of the barrier may allow a spot for a person to stand. However, it would be extremely difficult to lift oneself over top of the barrier from this position due to the lack of handholds and the pointed tops of the pipes.

2.3 GOLDEN GATE BRIDGE, SAN FRANCISCO

The Golden Gate Bridge in San Francisco is infamous for having the highest rate of deaths by suicide of any bridge in North America. The bridge has seen more than 1700 deaths since its opening in 1937. Discussions of installing a barrier have been occurring for decades but all attempts have been held back by preservation groups who were opposed to “tarnishing” the historic design. The Public also had many concerns that individuals contemplating suicide would seek another site nearby and that a barrier would not solve the underlying problem (Swan, 2018). It was finally decided that the best way to minimize the impact to the appearance and visibility from the structure was a netting system that is to be installed 20 feet below the edges of the deck, projecting 20 feet outwards. The net is currently being built and will reportedly cost approximately US\$211 million by the time construction is complete in 2021 (Toronto, 2018). The net itself is made of a horizontal steel mesh supported by cantilevered steel brackets connected to the bridge superstructure. Figure 2.4 below shows a rendering of the proposed net system.



Figure 2.4 – Golden Gate Bridge Net - Render (Swan, 2018)

Advantages

The proposed Golden Gate Bridge netting system caters to the psychological concept that individuals contemplating suicide only wish to take their lives, so as such they may avoid situations that would cause harm but not death. A steel mesh 20 feet below the deck could cause substantial harm to a person who has jumped onto it, but it is not likely to result in death. This also ties into the concept of remorse after an attempt to die by suicide. Many survivors of an intentional fall from a height have stated they regret the decision immediately after the attempt. A net can provide this “second chance” that a desperate person may need (Draper, 2017). A netting solution is also optimal when it comes to minimizing visual impacts to the structure, particularly from the deck level. Such a system would have no influence on the view from the bridge deck and would partially blend in to the rest of the bridge superstructure when viewed from the sides. Consequently, a below-deck net is also optimal from an architectural preservation perspective, whereby the image of the bridge is not substantially altered.

Disadvantages

There are several consequences from a structural standpoint when adding such a heavy system onto a comparatively lightweight and slender bridge. In the case of the Golden Gate Bridge, motion dampers are being installed to counteract the additional wind load induced by the significant netting area (Toronto, 2018). Depending on the condition and design characteristics of a particular structure, such a system may require significant stiffening and additional brackets and support members to support such a net, if the bridge is even structurally capable of supporting it at all. As seen in the Golden Gate Bridge example, such a system and the associated structural improvements can be extremely expensive and take a significant amount of time to design and construct.

One could also make the argument that a net is not a true means prevention system in that it does not physically prevent a person contemplating suicide from attempting to fall from the bridge. A net will only provide the threat of injury or will catch individuals who do have an intentional fall and will then need to be rescued at the risk of first responders. A similar concern is that if an individual sees the net when contemplating death, they may decide to climb down to the net and then fall from this lower position.

2.4 PRINCE EDWARD VIADUCT, TORONTO

The Prince Edward Viaduct, also known as the Bloor Street Viaduct, had the 2nd highest rate of deaths by suicide of any bridge in North America, behind only the Golden Gate Bridge (Toronto, 2018). Located in Toronto, Ontario, the 494m length bridge experiences substantial pedestrian traffic and crosses over one of the busiest highways in the city. To address rising concerns over the high number of deaths from the bridge, the City of Toronto installed a complex vertical barrier system in 2003. The barrier uses a series of 5m tall vertical rods connected to an inclined structure supported off the side of the bridge. To maintain structural integrity, the barrier uses a system of cables to support the structure and reduce the impacts of additional wind loads. The barrier is considered to be architecturally significant and has been given the name ‘Luminous Veil’. Refer to Figure 2.5 below for a deck view of the barrier.



Figure 2.5 – Prince Edward Viaduct Barrier (McQuigge, 2017)

Advantages

The Prince Edward Viaduct barrier showcases the most extensive version of a means prevention barrier. Reaching over 5m tall, it is regarded as one of the most effective systems of its kind. Since its construction in 2003, only a single death by suicide has occurred when there had previously been an average of 9 per year (McQuigge, 2017). One of the key design features of this barrier is the focus put on creating a system that was very effective, but also architectural pleasing. The design received approval from the local heritage groups who were previously opposed to a barrier (Toronto, 2018). The height and slenderness of the vertical rods prevent climbers from scaling the barrier while minimizing the impacts to the view from the bridge. Help phones and signage were also installed on the bridge as supplementary measures.

Disadvantages

While the Prince Edward Viaduct barrier is regarded as one of the most effective means prevention barriers, it is also one of the most complex. Significant architectural and structural design would have been required, and the tremendous size of the barrier would incur high material and construction costs. A barrier of this size also presents maintenance issues as specialized equipment would be needed to clear the barrier to access the outer portions of the bridge. Additionally, it was recorded that deaths by suicide on nearby structures increased immediately after the barrier was constructed, indicating that suicide displacement was occurring. However, the rate of deaths on these nearby bridges has since stabilized to the levels prior to the Luminous Veil's construction, meaning a long-term reduction in deaths by suicide from bridges has occurred (Toronto, 2018). This corresponds to research conducted at other high-profile suicide-magnet bridges around the world (McQuigge, 2017). It should be noted however that it is impossible to say that other factors, such as increased public awareness and new assistance programs, have not skewed these results positively in the long-term.

2.5 HIGH LEVEL BRIDGE, EDMONTON

To address rising concerns of deaths by suicide from the High Level Bridge in Edmonton, Alberta, a horizontal steel cable barrier was constructed on each side of the 777m long structure. The system makes use of a series of horizontal cables suspended between steel posts which are mounted directly to the sidewalk, as shown in Figure 2.6 below. The tops of the posts are inclined towards the sidewalks to deter individuals from climbing over the barrier. The system was reported to cost \$3 million (Toronto, 2018).



Figure 2.6 – High Level Bridge Barrier (Suicide, 2017)

Advantages

Research indicates that the overall rate of deaths by suicide in the area has decreased since the barrier has been installed (McQuigge, 2017). The design was considered the most cost-effective solution for the long length of the bridge. The barriers were bolted directly to the sidewalks and required no other structural connections or modifications. The barrier was also installed in front of the existing bridge railing, simplifying construction accessibility and negating any interference with existing bridge components. Consequently, this system is fairly light weight, easy to construct, and uses a minimum amount of material. It is also preferable in that it minimizes the impacts to the view from the bridge. The design of the painted black steel components also fits in with the architecture of the existing bridge.

Disadvantages

The High Level Bridge barrier is an example of a non-optimal barrier design being installed due to cost concerns. Since the implementation of the barrier, there has only been a reported 50% reduction in deaths by suicide from the structure. Individuals are still able to climb over the barrier due to the horizontal cables acting as a ladder (Suicide, 2017). For comparison, the proposed optimal design was to use vertical stainless-steel bars, but this option was rejected due to a higher estimated cost of \$7.5 million (Toronto, 2018). In addition to acting as a ladder, the horizontal cables have been susceptible to vandalism, with several examples reported of people cutting the cables. This allows a gap of any size to be created, essentially bypassing the barrier completely. Finally, cyclists and Pedestrians have made complaints regarding the tapered barrier impeding on the sidewalk headroom.

2.6 OTHER BARRIER EXAMPLES

In addition to the case studies described above, there exist many other examples of means prevention barriers installed on many different types of bridges throughout the world. Table 1 below summarizes several of these other bridges and indicates which barrier type is installed. Most of these examples follow similar designs to the examples previously outlined in this section. If further samples of bridge barriers are needed, several pictures and articles exist for each of the listed structures. Note that many of these bridges also have supplementary measures installed, such as help phones and signage, which may also be reviewed for information if needed.

Table 1 – Means Prevention Barrier Examples

Bridge Name	Location	Barrier Type
Golden Ears Bridge	Vancouver, British Columbia	Cantilevered steel pipe barrier (similar to Ironworkers Memorial Bridge).
Jacques Cartier Bridge	Montreal, Quebec	Picket fence barrier mounted to sidewalk with horizontal member near top. Tops of pickets are curved towards the sidewalk.
Angus L. MacDonald Bridge	Halifax, Nova Scotia	Cantilevered steel pipe barrier (similar to Ironworkers Memorial Bridge).
Aurora Bridge	Seattle, Washington	Picket fence barrier mounted to edge of deck with horizontal member near top. Barrier is outside of the existing parapet and mounted to deck overhang.
Bourne Bridge Sagamore Bridge	Bourne, Massachusetts	Picket fence barriers mounted to sidewalk with horizontal member near top. Tops of pickets are curved towards the sidewalk.
Ithaca Gorge Bridges	Ithaca, New York	Net system installed below deck (Similar to Golden Gate Bridge). Reports exist of suicides still occurring at the bridge. A temporary vertical barrier has since been installed at deck level.
All-America Bridge	Akron, Ohio	Vertical mesh fence barrier. Uses a fine steel mesh supported between adjacent vertical posts.
Memorial Bridge	Augusta, Maine	Vertical mesh fence barrier. Uses a standard steel mesh supported between adjacent vertical posts. Top of fence is inclined towards the sidewalks.
Duke Ellington Bridge	Washington, DC	Picket fence barrier mounted to edge of deck with horizontal member near top (similar to Burrard Street Bridge). Pickets curved towards sidewalk. Barrier is outside of existing parapet mounted to deck overhang.
Cold Spring Canyon Arch Bridge	Santa Barbara, California	Vertical mesh fence barrier. Uses a standard steel mesh supported between adjacent vertical posts. Fence is inclined towards the sidewalks.
Grafton Bridge	Auckland, New Zealand	Curved clear polycarbonate barrier mounted on top of parapets. Forms a canopy above the sidewalks.
Sydney Harbour Bridge	Sydney, Australia	Vertical mesh fence barrier. Top of fence is curved towards the sidewalks with barbed wire at the top. Fence is on both sides of both sidewalks, creating a “cage” that fully encloses the sidewalks.

3.0 BARRIER ALTERNATIVES

3.1 DESIGN CONSIDERATIONS

Using the recommendations and design traits of other successful means prevention barriers, Parsons is proposing the following criteria for the successful implementation of a barrier on the exterior edges of the Burgoyne Bridge. This list is also compiled based on the results from analyzing the case studies in Section 2 of this report.

1. A height greater than 2.5m above the sidewalk to prevent individuals from reaching up and easily pulling themselves over. The taller the barrier, the more effective it will be to prevent climbers.
2. Gaps between components should be 150mm or less to prevent an entire body from passing through any openings.
3. No foot or hand holds, particularly near the top of the barrier which would allow someone to lift or push themselves over. Likewise, any flat surfaces near the top of the barrier should be avoided.
4. The barrier should be composed of smooth vertical components that are hard to grab onto and provide no grip for a foot or hand to push against.
5. The components at the top of the barrier (pickets, posts, pipes, etc.) should be angled or pointed to prevent them from becoming a hand hold. If any horizontal members are located near the top of the barrier, the vertical components should be extended beyond to prevent someone from using the horizontal section to pull themselves up and over the barrier.
6. A barrier should provide the impression of imperviousness. The more difficult a barrier looks to overcome, the lower the chances that someone will attempt to climb it. This can be done by increasing the height of the barrier, using solid and stiff components, and minimizing any hand and foot holds.
7. Structural and aerodynamic stability: any barrier system should not compromise the structural capacity of the bridge and should be sound under all operating conditions. Special consideration should be put into the wind and snow/ice effects of the barrier and the impacts to the entire bridge.
8. Accessibility should not be impacted by the barrier for vehicles, cyclists, or pedestrians. This may be an issue on barriers which have a taper or incline towards the sidewalk or bike lane.

Similar considerations exist for the design of the horizontal net system that is proposed for the interior gap between the bridge decks. The net system must be structurally sound, free of any openings that would allow someone to pass through and should give the impression of imperviousness. In the case of the Burgoyne Bridge, the small number of netting examples and lack of any inclined barrier case studies will require barrier designs not seen on any other bridges. However, there are key concepts and design considerations that can be taken from the case studies outlined in Section 2 and applied to the special requirements of the Burgoyne Bridge. This section will describe and compare the alternatives proposed by Parsons for both the interior and exterior means prevention barriers.

3.2 EXTERIOR BARRIER

As previously discussed, it is understood that the Region is requesting an exterior barrier which will match the profile of the existing debris fence on the south east edge of the east bridge deck. Additionally, it has been noted that all barrier alternatives should minimize impacts to the existing bridge railing systems. As such, Parsons is recommending two alternatives for the exterior barrier. Both barrier options will have the same profile but will have different options for the design of the vertical members which will act as the primary means prevention components. It should be noted that a system identical to the existing debris barrier (which uses a mesh fence) is not recommended for the purposes of a means prevention barrier as such a fence is easily scalable, regardless of height.

Additionally, per the Region's request, the proposed barrier alternatives will have the capacity to be constructed with either galvanized steel or aluminum materials. However, due to the structural differences with regards to material properties between the two metals, member sizes will be different between the two metal types to achieve the same deflection performance. The impacts of each metal type for the proposed barrier will be discussed in the following sections. It should

also be noted that stainless steel was omitted from consideration due to the much higher material costs as compared to galvanized steel and aluminum, with costs reaching upwards of 10-15 times more than these metals.

3.2.1 ALTERNATIVE 1: INCLINED BARRIER WITH CANTILEVERED PIPES

The first proposed alternative for the exterior means prevention barrier on the Burgoyne Bridge is an inclined cantilevered pipe barrier. Similar to the Ironworkers Memorial Bridge barrier outlined in Section 2.2, this barrier type utilizes larger diameter members to eliminate the need for any horizontal elements at the top of the barrier which could be used to climb over. Refer to Figure 3.1 below for a concept drawing for this barrier alternative. Refer to **Appendix B** for the full drawing. The pipes will in turn be mounted to a series of I-section posts. The posts will be connected to the bridge at every other existing railing post with a plate and bracket and will be anchored to the exterior face of the deck overhang. The tops of the pipes will be cut at an angle to prevent someone from using them to pull themselves over the top of the barrier. This option also has the capacity for an architectural shape at the top of the barrier, such as a scalloped or stepped top.

The estimated galvanized steel pipe outer diameter for this option is 48mm, with aluminum being 60mm. This is due to the reduced stiffness of the aluminum creating deflection concerns if an individual were to attempt to force the members apart as compared to steel. In order to account for the decreased stiffness and reduce deflections to an acceptable limit, the aluminum components would need to be larger than their steel counterparts.

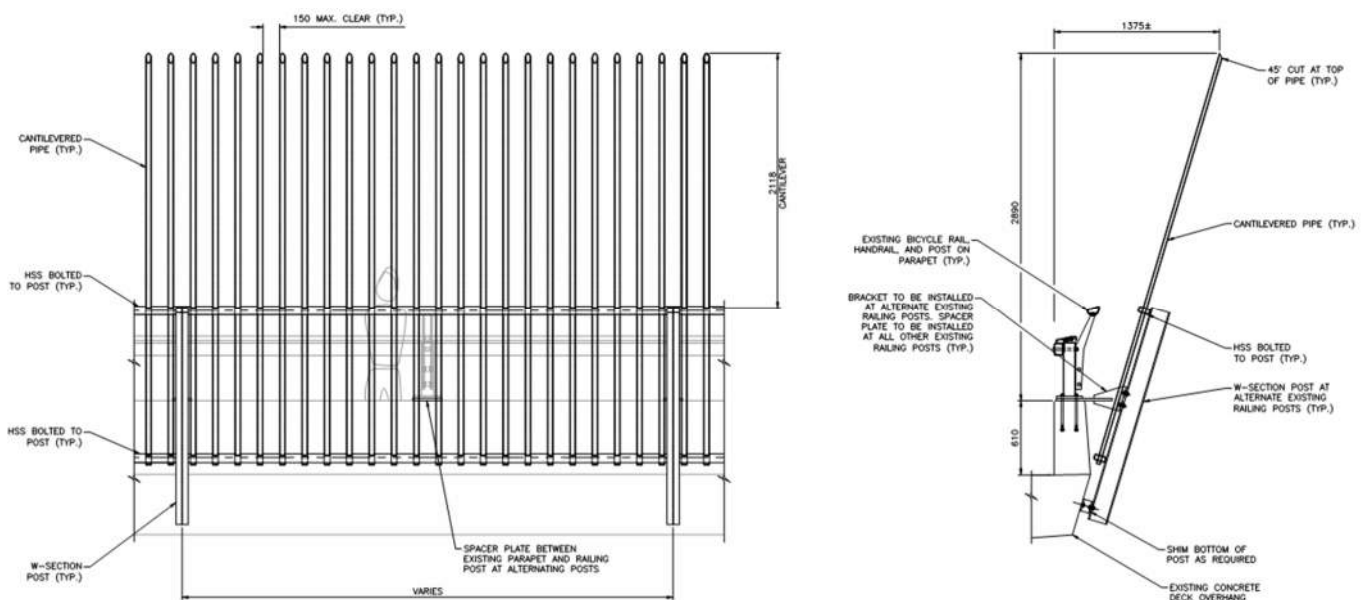


Figure 3.1 – Exterior Barrier Alternative 1

Advantages

This barrier type imposes a good sense of impassability and is the best option for means prevention effectiveness. The cantilevered pipe design limits the number of available handholds by not requiring an upper horizontal member for support. Likewise, the smooth surfaces of the pipes will prevent anyone from getting a solid grip and scaling the barrier. The angled cut at the top of the pipes would make it difficult for anyone to grab the top of the pipes and pull themselves up and over the barrier. Many existing barriers of the same design can be found on several landmark structures around North America, giving evidence of the effectiveness and efficiency of this type of barrier. Mock-ups have also shown that this barrier type gives a strong impression of imperviousness due to its height, member sizes, and lack of handholds. Finally, the ability to add architectural shaping to the top of the barrier will help to incorporate the system into the existing bridge design as much as possible.

Disadvantages

Alternative 1 may prove to be heavier than option 2 due to the increased member sizes required for the cantilever construction. However, this weight would be reduced if considering the aluminum option, even though the members will need to be larger. Additionally, the larger diameter pipes will reduce the view from the bridge and will be clearly visible when observing the bridge from the sides. This view obstruction is compounded when considering the larger diameter pipe required for the aluminum option. Consequently, increasing the diameter of the pipes for aluminum construction will result in an increased size for the HSS supports at the lower end of the barrier.

Damping of the cantilevered pipes will be required to reduce the effects of vibration for both the steel and aluminum options as a result of wind, rain, snow, and ice loading. More extensive damping will be required for the aluminum pipes due to the reduced stiffness when compared to steel. Aluminum is much more susceptible to induced vibrations than steel, with vibrations starting at lower applied loads and lasting for longer durations. This observed phenomenon can be easily explained from a material properties standpoint, with aluminum having a much lower stiffness than a comparable steel member, which results in a higher vibration frequency and time period before self-damping occurs. If the aluminum material option is selected for this barrier, special consideration will need to be given to the dynamic and fatigue design of the members to ensure there are no long-term performance concerns.

3.2.2 ALTERNATIVE 2: INCLINED BARRIER WITH SUPPORTED PICKETS

The second proposed alternative for the exterior means prevention barrier is an inclined supported picket barrier. Similar to the Burrard Street Bridge outlined in Section 2.1, this barrier type utilizes round steel pickets supported with horizontal members. The horizontal supports near the top of the barrier combined with full-height I-section posts will allow this alternative to use thinner, solid metal rods as the primary fencing system. Refer to Figure 3.2 below for a concept drawing for this barrier alternative. Refer to **Appendix B** for the full drawing. The remainder of the system will be identical to Alternative 1 due to the constraints of matching the profile to the existing debris barrier and minimizing impacts to the railing system.

The approximate diameter for the picket rods would be 21mm for galvanized steel and 25mm for aluminum. The upper HSS support alleviates many of the concerns found with using aluminum for Alternative 1 in that this system will be less susceptible to vibrations and induced deflections if a person attempts to pull the bars apart.

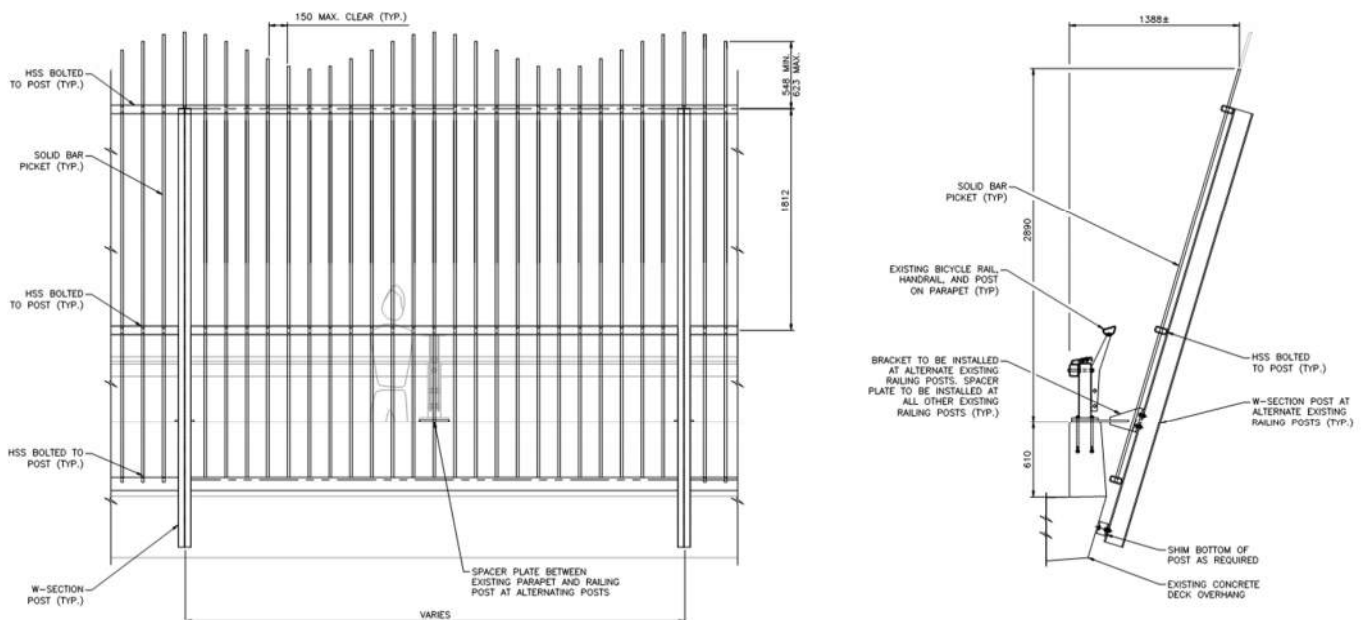


Figure 3.2 – Exterior Barrier Alternative 2

Advantages

Alternative 2 for the exterior barrier benefits from a lighter assembly due to the thinner pickets. By providing full-height posts and horizontal support members, the pickets do not need to be as large as they would be if they were cantilevered. The thinner vertical bars are also optimal from a viewing perspective as they will result in less obstruction to the view from the bridge. As with Alternative 1, this option allows for architectural features in the design. As shown in Figure 3.2 above, the proposed alternative 2 has a scalloped design, but other styles can easily be accommodated. The thin nature of the pickets also results in a built-in safety feature in that the small diameter tops would make it difficult for someone to pull themselves onto and over the barrier. As with Alternative 1, the top of the pickets can be clipped to deter them from being used as a handhold. As a result of the extra horizontal support, there will be less concerns over the barrier members vibrating when exposed to wind and snow loading. Finally, the steel and aluminum options will have generally the same construction, with the aluminum components only slightly larger than their steel counterparts to accommodate the lower stiffness of the aluminum.

Disadvantages

The primary drawback of the supported picket style barrier is the inclusion of the horizontal member near the top of the barrier which may present a handhold and potentially increase the risks of an individual being able to scale the barrier. However, by extending the pickets above this member, the ability for someone to use it as a handhold is reduced. Another drawback of this design is that the I-section posts would need to extend the full height of the barrier in order to support the upper picket connection member. This will add bulk to the barrier resulting in a discontinuous appearance to the overall system. Finally, Alternative 2 may not be as physically imposing as Alternative 1 due to thinner components comprising the majority of the barrier, which reduces the impression of impassability that is crucial to a successful means prevention barrier.

3.3 INTERIOR BARRIER

As previously discussed, it is understood that the Region is requesting an interior means prevention barrier system which will be in the form of a steel net spanning between the bridge decks over the full length of the Burgoyne Bridge. As with the exterior barrier, it has been noted that all barrier alternatives should minimize impacts to the existing bridge railing systems and other bridge components. An additional constraint on the arch span is that the net cannot impact the performance of the arch hanger system. As with the exterior barrier, Parsons is recommending two alternatives for the interior barrier. Both systems will be identical in design but will be positioned at different heights on the exterior side of the parapet walls. It is recommended that both alternatives use a very large mesh opening to discourage anyone from walking or climbing on top of the net. This will also reduce the visual and weight impacts of the system to the bridge. The proposed netting options on the Burgoyne Bridge also alleviates the major concerns with other netting systems (such as the Golden Gate Bridge) in that there will be no option to bypass the net as it will completely fill the gap between the bridges.

The proposed net system for both alternatives will be a stainless-steel cable net which will be supported by longitudinal cables adjacent to the parapet walls and transverse cables at intervals along the entire bridge length. The system will be supported by stainless steel connectors and brackets which will be either bolted to the parapet walls or utilize the existing railing anchorages. The net system will be highly durable, weather resistant, and customizable to be able to fit the complex geometry of the Burgoyne Bridge. Various options exist to allow for the replacement of the light poles on the bridge, as well as maintenance of the arch stay pipes and cables. Such a system has been used in various applications for pedestrian safety on buildings and bridges, particularly in Europe.

3.3.1 ALTERNATIVE A: HORIZONTAL MESH AT TOP OF PARAPETS

Interior barrier Alternative A consists of a horizontal steel mesh system spanning between the bridge decks which utilizes the existing railing anchorages for support brackets. The benefit of this arrangement is that there will be no drop onto the net if someone attempts to climb onto it. The net will act purely as a fence system to block anyone from falling from the bridge, as opposed to a method of catching someone during a fall. This option will be visible from the bridge deck to vehicles and pedestrians, which may have the unintended result of promoting people to climb on the net. There is also the potential of vandalism occurring to the net, an issue that will be compounded if the system is easily accessible from the deck level. However, construction and maintenance of the net system will be easier as the components will be accessible from deck level. Additionally, having the net located at the railings allows for the existing railing anchor bolts to be used, avoiding the need to anchor new brackets into the parapet walls. Coincidentally, mounting the net at the top of the parapets avoids interfering with the light pole pedestals and the access panels for the arch thrust blocks. Refer to Figure 3.3 for a concept sketch for Alternative A. The full drawing can be found in **Appendix B** as well as a separate drawing which includes the proposed provisions for protrusions in the net for the stay cables and light poles.

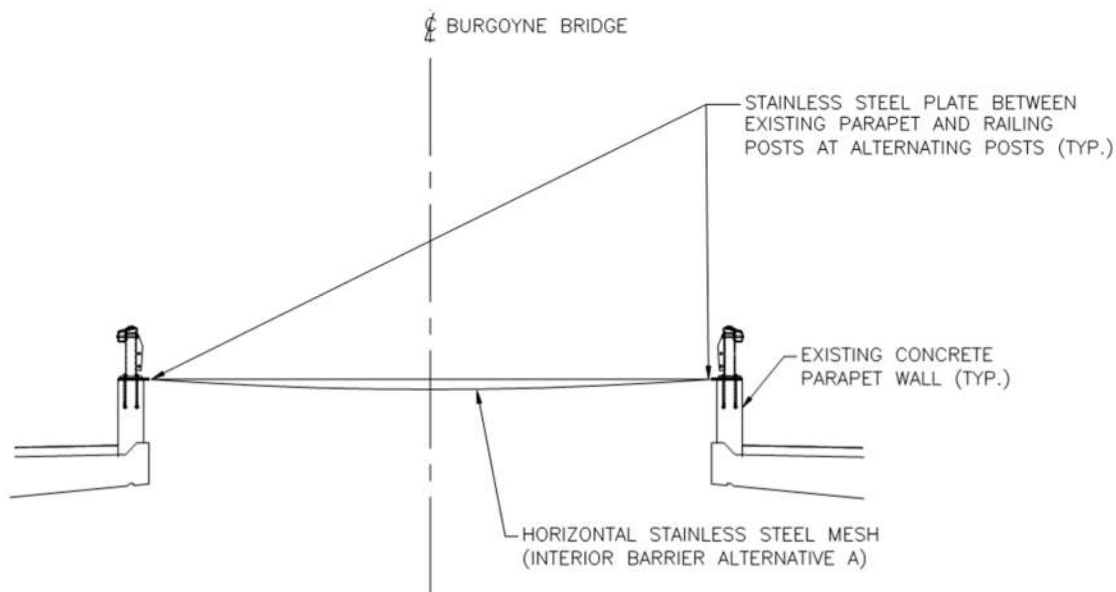


Figure 3.3 – Interior Barrier Alternative A

3.3.2 ALTERNATIVE B: HORIZONTAL MESH AT BOTTOM OF PARAPETS

Interior barrier Alternative B consists of a horizontal steel mesh system spanning between the bridge decks which is anchored to the deck overhang faces at the bottom of the parapet walls. This arrangement may allow someone to scale over the railing and parapet wall and climb on the net. Since the net is partially hidden by the parapet, it may be difficult to identify if a person is on the net and if they may need help. Similarly, a person would have the opportunity to jump onto the net from the top of the parapet wall due to the height difference, which may result in injury. Consequently, retrieving a person who is on the net may be more difficult for rescue personnel due to the restriction from the parapet and railing. Otherwise, having the net system below the level of the parapets will help to reduce the visual impact on the structure as it will be more difficult to see from the deck level. This option will also help to reduce the possibility of vandalism as the net will be more difficult to access from the deck. However, installation and maintenance of this system will also be reduced as the connections will be more difficult to access. Additionally, conflicts with the light pole pedestals and the arch thrust block access panels would require additional detailing of the net and may limit the required access during service. Finally, anchoring the support brackets to the existing concrete parapet walls may be difficult and time consuming due to the

possibility of striking reinforcement within the wall. Refer to Figure 3.4 below for a concept sketch for Alternative B. The full drawing can be found in **Appendix B**.

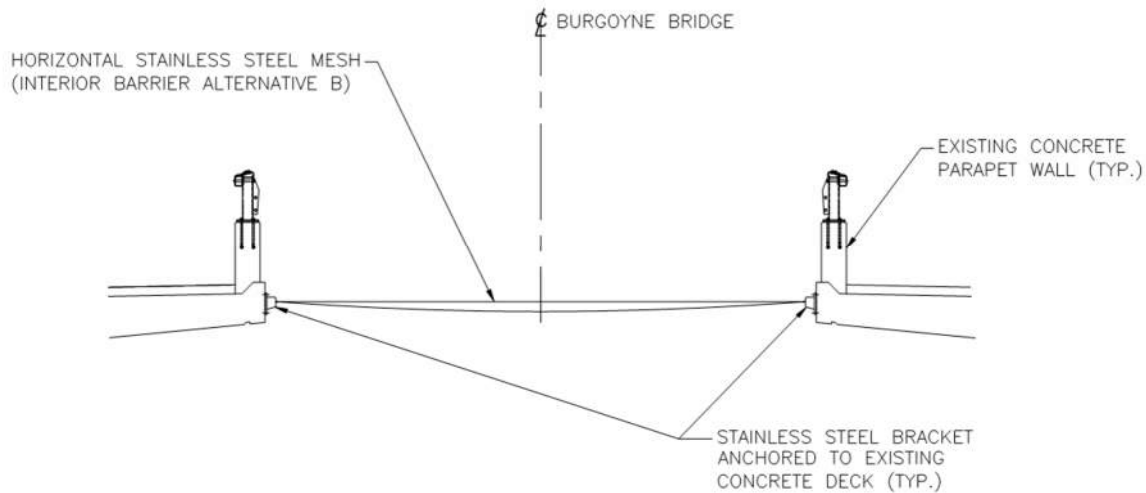


Figure 3.4 – Interior Barrier Alternative B

3.3 RECOMMENDED BARRIERS

Exterior Barrier

Parsons is recommending that Alternative 1 be selected for the exterior barrier. This inclined cantilevered pipe barrier was determined to be the best option with regards to means prevention. This barrier type provides a greater sense of impassibility and imperviousness, while the cantilevered design reduces the number of handholds, making it very difficult to scale the barrier. The smooth, larger diameter pipes would be challenging to hold on to or use as a foothold, and the angle cut into the top of the pipes further limits the ability for an individual to attempt to climb over the barrier. Most importantly, there are numerous successful precedents that can be observed on several bridges throughout the world where the same barrier type has been constructed.

Per the Region's request, Parsons has allowed for this barrier type to be constructed with either galvanized steel or aluminum components. As previously discussed, the lower stiffness of aluminum as compared to steel results in larger structural members for an aluminum option (60mm outer diameter) vs. the steel (48mm outer diameter) to limit the deflections of the pipe components. In an effort to understand the view differences between the two material options for the proposed exterior barrier system, Parsons has created a model comparing the two materials, as shown in Figure 3.5 below.

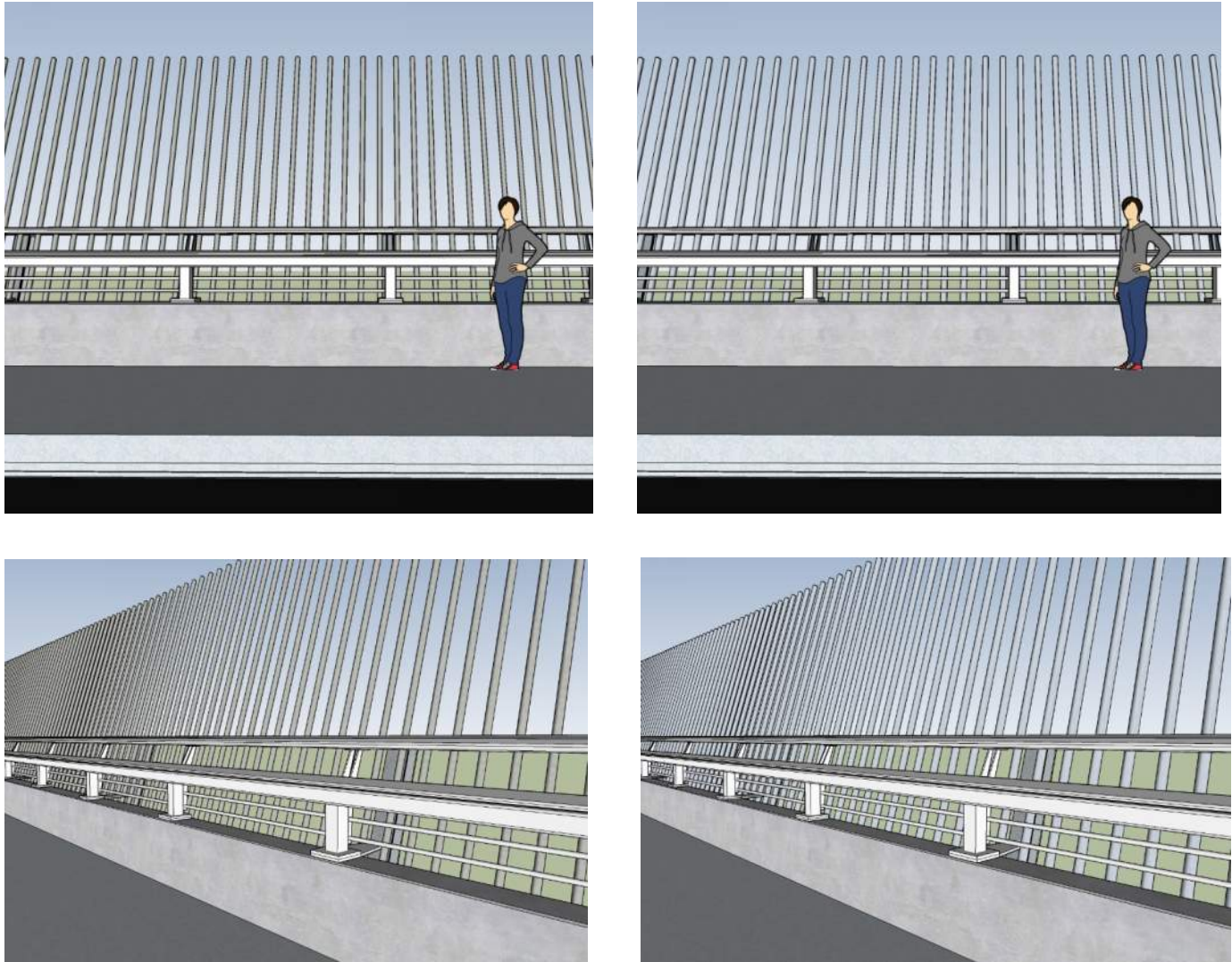


Figure 3.5 – Exterior Barrier Proposed Alternative – Galvanized Steel (Left) vs. Aluminum (Right)

The recommended interior and exterior barriers will be further discussed in the following sections and the preferred material type will be determined for the exterior barrier.

Interior Barrier

Parsons is recommending that Alternative A, a horizontal steel mesh mounted at the top of the parapet walls, be utilized for the interior barrier. This interior barrier configuration would allow for easier installation and maintenance of the net as compared to the other option due to the easier access from the bridge decks. By utilizing the existing railing anchor bolt assemblies for attaching the support brackets, construction of the net would minimize impacts to the bridge and avoid time consuming concrete anchoring. Additionally, no drop onto the net from the parapet wall and railing could potentially reduce the ability for a person to become trapped on the net and limits the efforts required for emergency personnel to rescue someone from the net if help is needed. Finally, by mounting the net at the top of the parapets, the light pole pedestals and arch thrust block access panels are avoided, thereby limiting complicated mounting techniques and impacts to the bridge and barrier during service.

4.0 DYNAMIC ANALYSIS

Parsons has retained RWDI to conduct dynamic analysis and wind tunnel testing of the proposed Burgoyne means prevention barriers. RWDI is in the process of building a sectional model of the bridge deck that replicates the bridge's main span geometry and mass distribution. The sectional model will be mounted on a spring suspension system and tested in the wind tunnel for the wind speed range that is expected at the project site. The model will be mounted in such a way that it can move both vertically and torsionally about the longitudinal axis. The deck will be tested with and without the means prevention barrier to assess the barrier's impact on the overall aerodynamic stability of the bridge deck. Tests will also be carried out to measure aerodynamic force and moment coefficients, with and without the barrier, that will be used for derivation of wind loads acting on the bridge. The sectional model tests are planned to take place in the coming weeks.

After completion of the tests, numerical methods will be used to combine the design wind speeds, turbulence levels at the site, static force and moment coefficients, and modes of vibration in order to determine wind loads acting on the bridge. Having recorded aerodynamic coefficients with and without the barrier allows for direct derivation and comparison of the wind loads between the two configurations evaluated. This information will be used during the detailed design phase of the barrier to ensure appropriate dynamic performance of the barrier.

In addition to determining the wind loads and confirming the dynamic performance of the bridge as a whole, dynamic analysis of the exterior barrier pipes will be required during the detailed design phase. It is likely that the pipes will require mass dampers to reduce vibrations caused by wind loading and potential vortex shedding around the exterior barrier pickets. Other successful precedents have been shown to use mass dampers within steel cantilevered pipes to limit vibrations under wind loading. These dampers have been shown to use minimal material and installation effort on similar barriers on other bridges. Without further analysis it is uncertain what extent of damping would be required for an aluminum barrier option. However, due to the reduced stiffness of aluminum as compared to steel, it could be argued that the level of damping will need to be more extensive than a steel option and may prove to be prohibitive from a cost or constructability standpoint or may simply be unfeasible for the member sizes and lengths proposed for this barrier. If aluminum is deemed to be the preferred material for the exterior barrier, more in-depth dynamic and material analysis will be required to confirm the extent of damping and that the final system will still conform to the mandatory means prevention requirements. Due to the lack of precedents on other bridges, the performance of an aluminum option is uncertain, and the level of damping poses a risk if this material is required.

5.0 CONSTRUCTION CONSIDERATIONS

Exterior Barrier

The exterior barrier will be designed in such a way that construction can be accommodated via lifting equipment situated on the bridge deck. The barrier brackets and posts will be installed as a single piece by locally lifting the existing railing and installing a plate onto the anchor bolts holding the railing to the parapet. The lower portion of the posts will be anchored to the concrete deck fascia with provisions to alter the anchor location if conflicts with reinforcement are encountered during anchor installation. Once the posts are installed, the vertical and horizontal barrier members will be installed in panels and bolted to the posts. This will allow for quicker construction, maintenance, and replacement. Depending on the size of lifting equipment selected, traffic can either be maintained on both bridge decks with traffic protection to delineate traffic from the workers and equipment (which would be located on the sidewalk side of the deck), or a closure of one of the decks during construction activities as with the interior barrier. If required, a bridge master unit can be used to scale over top of the outer barrier for construction of the barrier or maintenance and inspection during service. Several bridge master models from various suppliers are capable of passing over top of the proposed exterior barrier. As depicted in **Appendix C**, it is estimated that the installation of the exterior barrier will require approximately 33 working days. A more thorough staging plan can be developed during the detailed design of the barrier.

Interior Barrier

The interior mesh net can be primarily installed from the deck level. Brackets can be installed between the parapet walls and railing posts by utilizing the existing post anchor bolts by locally unbolting and lifting the railing. Once the brackets are installed the longitudinal and transverse support cables can be connected. The mesh net can then be attached to these support cables. An under-deck platform will be required spanning between the decks for a portion of the interior barrier where the transverse net cables are installed to allow for the net to be threaded onto these cables. It is expected the platform can be relocated at each applicable location as required. The installation of this barrier will also require a closure of one of the bridge decks when installing the barrier components as the net will need to be put into place from the deck level. Temporary traffic signals or flagging could be utilized to maintain two-way traffic during construction. As depicted in **Appendix C**, it is estimated that the installation of the interior barrier will require approximately 27 working days. A more thorough staging plan can be developed during the detailed design of the barrier.

6.0 COST ESTIMATES

6.1 CONSTRUCTION COST ESTIMATES

Estimated material, fabrication, delivery, and installation costs for the interior barrier and both galvanized steel and aluminum options for the exterior barrier are included in **Appendix C**. This cost estimate includes all expected works for the Burgoyne means prevention barriers. These cost estimates include a 40% contingency due to the custom fabrication and installation work which is difficult to quantify due to the lack of similar projects in Ontario for reference. Table 2 below includes a summary of the total material and fabrication costs, delivery costs, and installation costs for both barriers.

Table 2 – Construction Cost Estimates

Item	Material and Fabrication	Delivery	Installation	Contingency (40%)	Total Cost
Interior Barrier	\$ 178,000	\$ 4,000	\$ 430,000	\$ 245,000	\$ 857,000
Exterior Barrier – Galvanized Steel	\$ 694,000	\$ 32,000	\$ 511,000	\$ 495,000	\$ 1,732,000
Exterior Barrier - Aluminum	\$ 657,000	\$ 32,000	\$ 511,000	\$480,000	\$1,680,000

As depicted in the table above, the aluminum exterior barrier is marginally less expensive than the steel exterior. This difference in estimated cost can largely be accounted for in the galvanizing process required for the steel components. If anodizing is selected for the aluminum option, it is expected the costs may become very similar for the two material options. As previously discussed, the extent of damping required for the aluminum option may also have unexpected costs associated with the analysis, design, fabrication, and installation of mass dampers.

6.2 LIFE CYCLE COST ANALYSIS

In order to evaluate and compare the life cycle cost performance of the steel and aluminum exterior barrier options, as well as the interior barrier, a life cycle cost analysis was performed, which can be found in **Appendix D**. The life cycle analysis considers a life cycle of 125 years to match the design life of the Burgoyne Bridge itself. Due to the life span differences between the galvanized steel, aluminum, and stainless steel, different material life spans and replacement years were selected based on an expected service life of the respective material. The cost analysis also considers periodic replacement

of a certain percentage of the barrier components to account for damage, vandalism, or localized excessive corrosion. Table 3 below summarizes the 125-year net present value costs associated with each barrier type.

Table 3 – Life Cycle Cost Analysis

Item	Life Cycle Cost: Net Present Value (NPV) at End of 125-year Life Cycle
Interior Barrier	\$ 892,000
Exterior Barrier – Galvanized Steel	\$ 2,465,000
Exterior Barrier - Aluminum	\$ 1,984,000

Table 3 indicates that the aluminum exterior barrier option will have a lower 125-year NPV life cycle cost as compared to an equivalent steel barrier. This is largely due to the longer material life of aluminum which is expected to remain in service condition for a longer period than galvanized steel. Comparatively, the stainless-steel interior barrier has a much longer material life meaning that the increase in life cycle cost over the capital cost is negligible over the life cycle of the barrier.

7.0 SUMMARY AND RECOMMENDATIONS

Parsons has been contracted by the Regional Municipality of Niagara Public Works Department to investigate possible means prevention measures following several deaths by suicide and suicide attempts from the Burgoyne Bridge. Along with the Region's feedback, Parsons has selected two barrier types for use as means prevention on the Burgoyne Bridge based on case studies and feasibility analysis. It is understood that means prevention effectiveness is of utmost importance in the selection of appropriate barriers for use on the bridge.

Parsons is proposing two barriers for the bridge: an interior stainless-steel mesh net barrier which is mounted at the top of the parapet walls spanning horizontally between the two bridge decks, and an exterior cantilevered pipe barrier mounted on the exterior edges of the bridge. The interior barrier was selected as it completely removes the ability for a person to fall from the bridge, while minimizing impacts to the appearance and functionality of the structure. Stainless steel components ensure a long service life and utilizing the existing bridge railing anchor bolts minimizes the construction difficulty and schedule. The exterior barrier was selected primarily due to its effectiveness at providing means protection. By utilizing cantilevered vertical members, the ability of a person to use hand holds to scale the barrier is removed. This barrier option is optimal for providing a sense of imperviousness which will help deter individuals from attempting to climb the barrier.

Parsons also investigated the use of both galvanized steel and aluminum materials for the construction of the exterior barrier. While life cycle costs are higher than an equivalent aluminum barrier (with similar initial construction costs), many precedents of steel pipe barriers indicate that other designers and owners have determined galvanized steel to be the most effective and efficient material for constructing such a barrier. While aluminum has been used in bridge railing systems, there have been no identified cantilevered pipe means prevention barriers constructed with this material. If aluminum is determined to be the selected material for this barrier, additional effort will be required. While both materials are expected to be feasible for the proposed exterior barrier, further analysis will be required during detailed design.

Report Prepared by:



Brent I. Archibald, P.Eng.

Senior Structural Engineer, Bridges

Report Reviewed by:



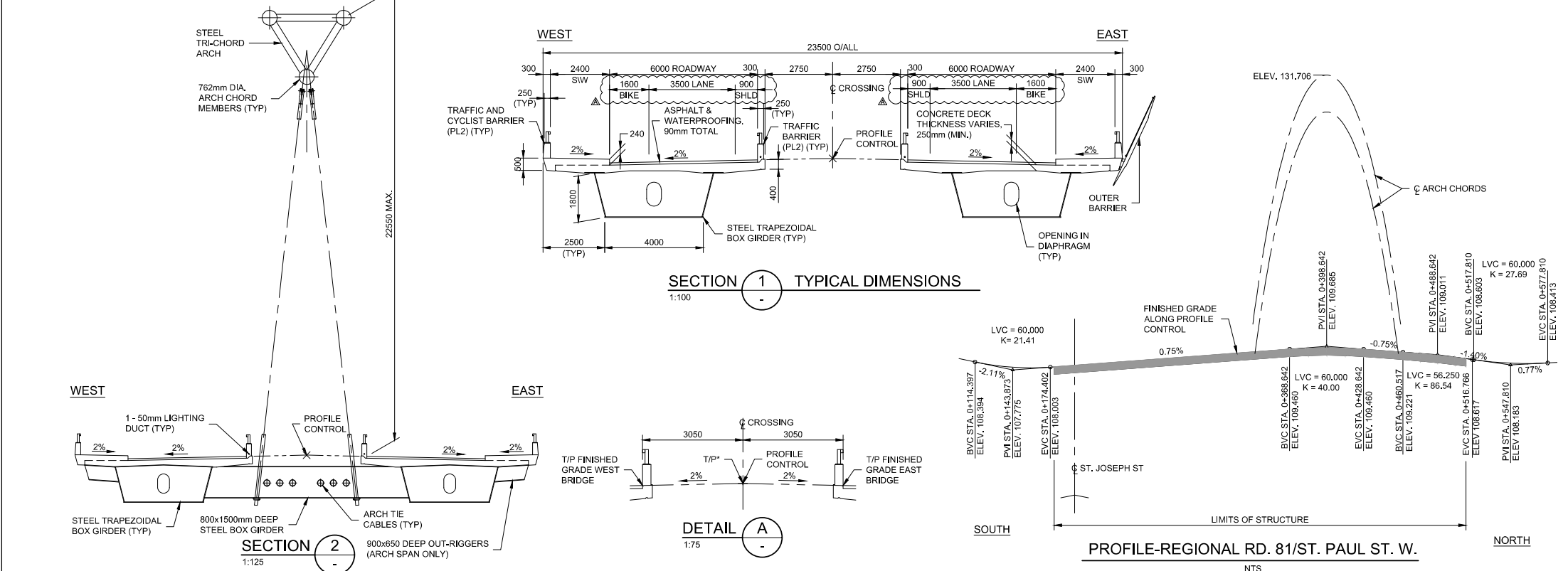
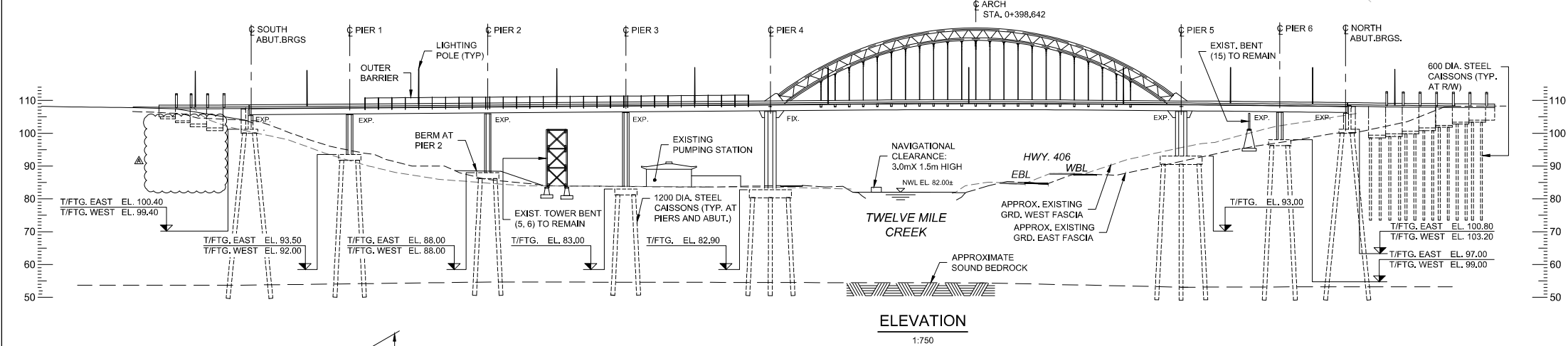
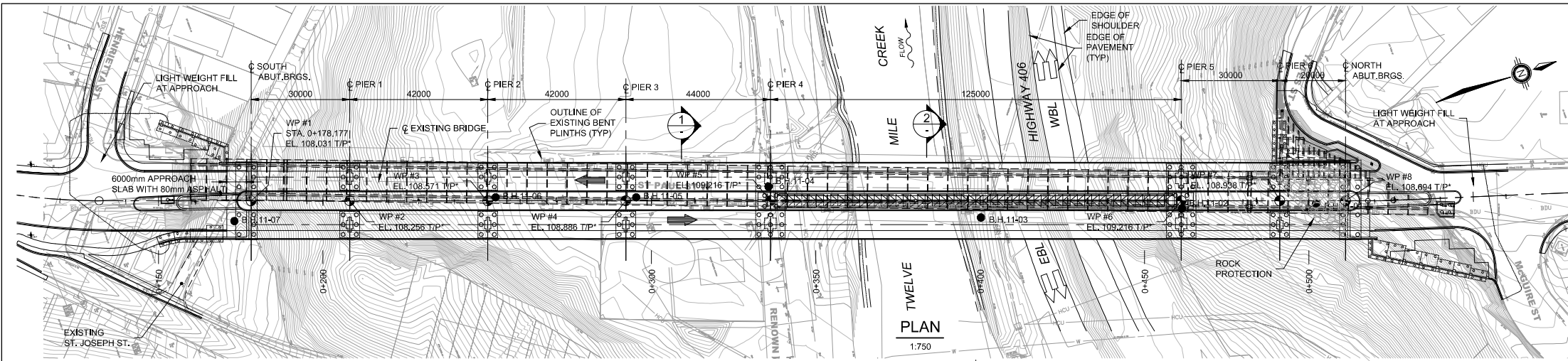
Sardar A. Nabi, M.S., P.E., P.Eng.

Program Director, Bridges

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APPENDIX A
BURGOYNE BRIDGE GENERAL ARRANGEMENT



GENERAL NOTES:

DESIGN LOADS

BRIDGE:

- CL-625-ONT TRUCK LOAD, CL-625-ONT LANE LOAD.

SIDEWALK:

- PEDESTRIAN LOADS AND MAINTENANCE VEHICLE OF CHBDC S6-06.

CLASS OF CONCRETE

THRUST BLOCKS 40 MPa

FOOTINGS, CAISSONS AND TOPPING SLABS 30 MPa

REMAINDER (UNLESS OTHERWISE NOTED) 35 MPa

- THE MAXIMUM NOMINAL SIZE OF AGGREGATE IN SIDEWALK SHALL NOT EXCEED 13.0mm.

CLEAR COVER TO REINFORCING STEEL

FOOTINGS & CAISSONS 100 ± 20mm

DECK & SIDEWALK:

TOP & SIDES (STAINLESS STEEL REINFORCING) 60 ± 10mm

BOTTOM (BLACK STEEL REINFORCING) 50 ± 10mm

REMAINDER 70 ± 20mm

UNLESS OTHERWISE SPECIFIED

REINFORCING STEEL

1. REINFORCING SHALL BE GRADE 400W UNLESS OTHERWISE SPECIFIED.

2. STAINLESS REINFORCING STEEL SHALL BE TYPE 316LN OR DUPLEX 2205 AND HAVE A MINIMUM YIELD STRENGTH OF 500MPa, UNLESS OTHERWISE SPECIFIED

3. BARS MARKED WITH PREFIX "S" DENOTE STAINLESS STEEL BARS.

4. UNLESS SHOWN OTHERWISE, TENSION LAP SPICES SHALL BE CLASS B.

5. BAR HOOKS SHALL HAVE STANDARD HOOK DIMENSIONS USING MINIMUM BEND DIAMETERS, WHILE STIRRUPS AND TIES SHALL HAVE MINIMUM HOOK DIMENSIONS. ALL HOOKS SHALL BE IN ACCORDANCE WITH THE MTO STRUCTURAL STANDARD DRAWING SS12-1, UNLESS INDICATED OTHERWISE.

CONSTRUCTION NOTES

1. ALL DIMENSIONS ARE IN MILLIMETRES UNLESS NOTED OTHERWISE. CHAINAGES AND ELEVATIONS ARE IN METRES.

2. MAINTAIN FULL NAVIGATIONAL CLEARANCE THROUGHOUT CONSTRUCTION.

3. THE CONTRACTOR SHALL ESTABLISH THE BEARING SEAT ELEVATIONS BY DEDUCTING THE ACTUAL BEARING THICKNESSES FROM THE TOP OF BEARING ELEVATIONS. IF THE ACTUAL THICKNESSES ARE DIFFERENT FROM THOSE GIVEN WITH THE BEARING DESIGN DATA, THE CONTRACTOR SHALL ADJUST THE REINFORCING STEEL TO SUIT.

LEGEND:

WP DENOTES WORKING POINT

T/P* DENOTES THEORETICAL TOP OF PAVEMENT AT PROFILE CONTROL (SEE DETAIL "A")

U/S DENOTES UNDERSIDE

SW DENOTES SIDEWALK

R/W DENOTES RETAINING WALL

T/FTG DENOTES TOP OF FOOTING

REFERENCE DRAWINGS

DRAWINGS OF THE EXISTING BRIDGE MAY BE VIEWED FOR INFORMATION PURPOSES AT THE OFFICES OF THE CITY OF ST. CATHARINES. ALL DIMENSIONS SHOWN ON REFERENCE DRAWINGS SHALL BE CONSIDERED APPROXIMATE.

THE PREFIX RR81-ST SHALL BE APPLIED TO ALL DRAWING NUMBER REFERENCES.

BENCHMARK

ELEVATION: 111.886

STATION: 00163U3519

N:4,778,711.270 E:642,154.302

APPLICABLE STANDARD DRAWINGS:

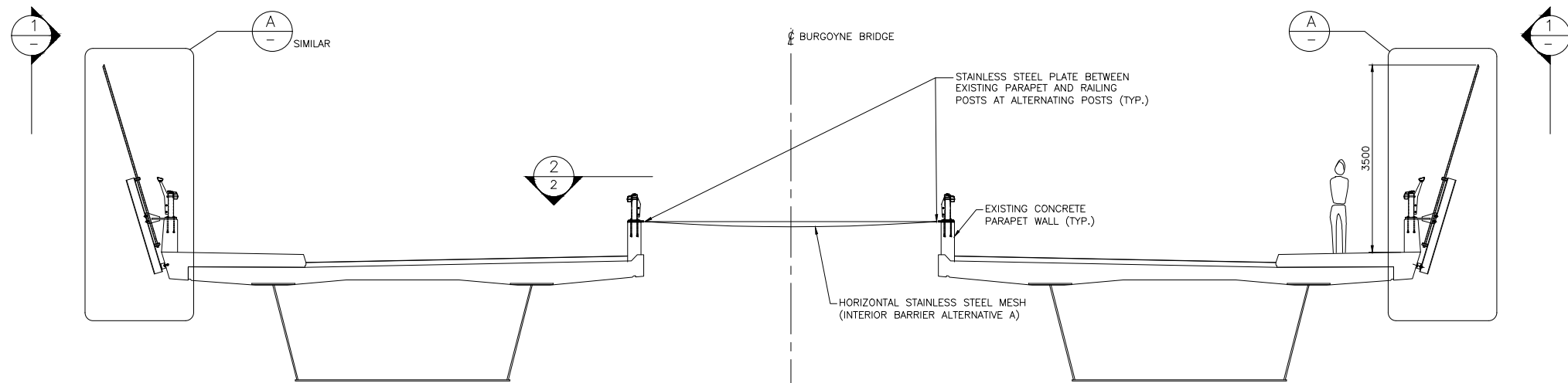
OPSD-3329.100 DECK, REINFORCEMENT SUPPORTS FOR REINFORCING STEEL FOR SLABS DEPTHS 300mm OR LESS

OPSD-3349.100 DECK, DRAINS DRAINAGE OF NEW DECK BELOW ASPHALT WEARING SURFACE

OPSD-3941.200 FIGURES IN CONCRETE, SITE NUMBER AND DATE LAYOUT

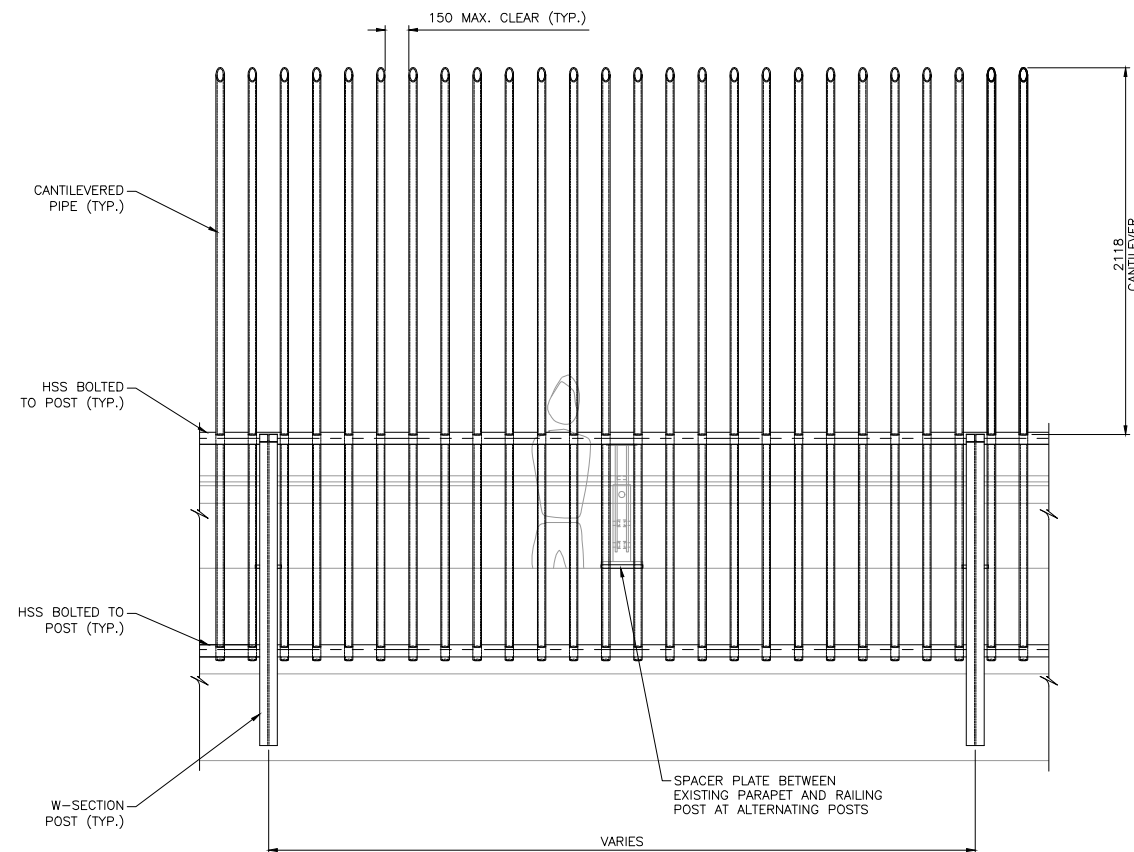
OPSD-3950.100 JOINTS, CONCRETE EXPANSION AND CONSTRUCTION ON STRUCTURE

APPENDIX B
BARRIER ALTERNATIVES – DRAWINGS



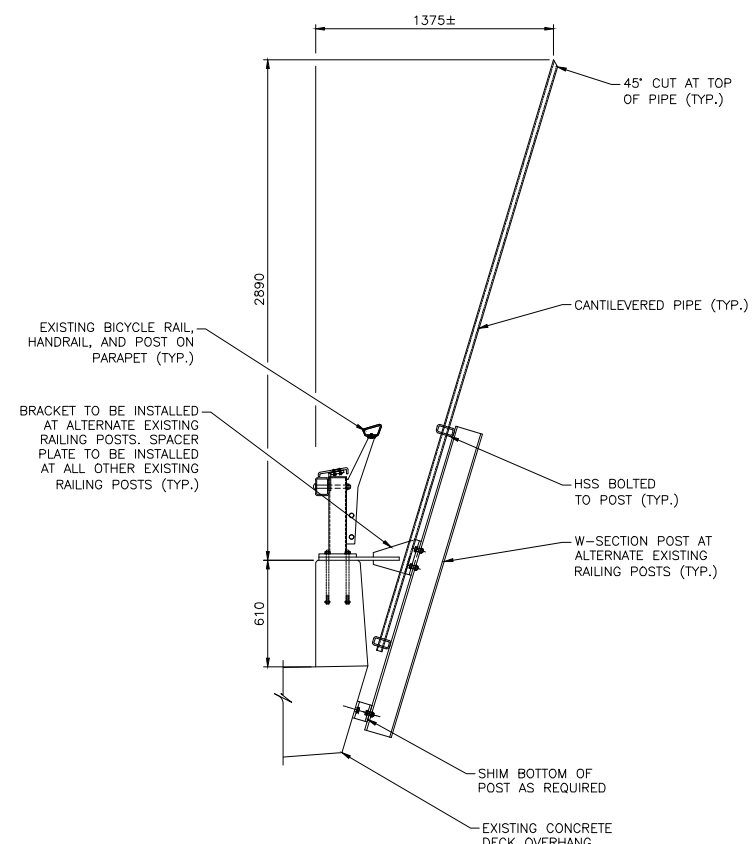
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1:50



SECTION
1:20

1
—



DETAIL
1:20

A
—

**NOT FOR
CONSTRUCTION**

NO.	REVISION	DATE	INIT.

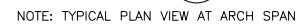
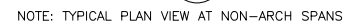
NOTES:
1. DIMENSIONS ARE IN MILLIMETRES UNLESS OTHERWISE SHOWN. ELEVATIONS ARE IN METRES.

DRAFTING
R.S.
DESIGN
B.I.A.
CHECKED BY
—
APPROVED BY
591

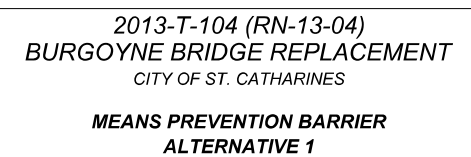


2013-T-104 (RN-13-04)
BURGOYNE BRIDGE REPLACEMENT
CITY OF ST. CATHARINES
MEANS PREVENTION BARRIER
ALTERNATIVE 1

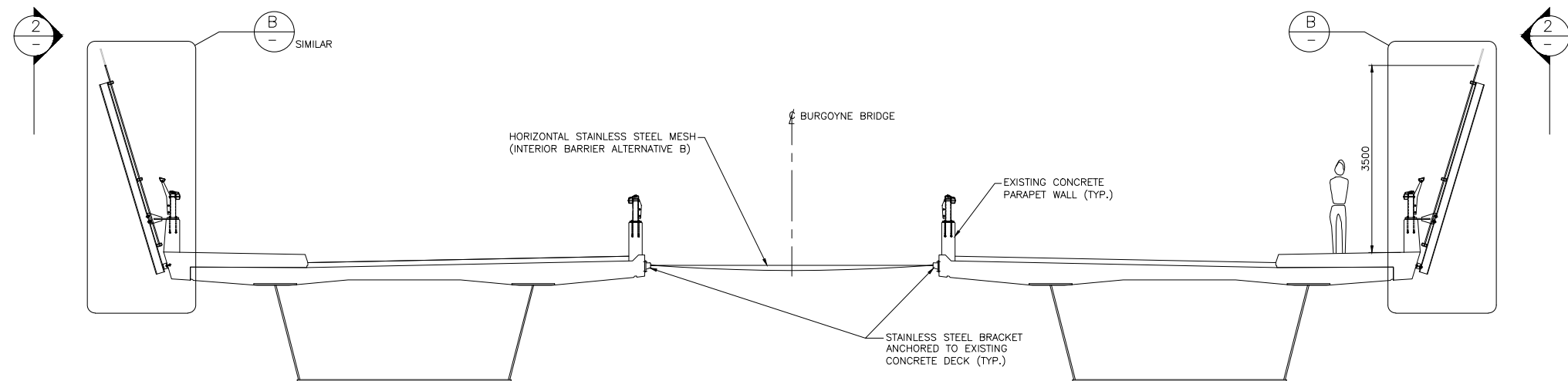
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DATE YYYY-MM-DD	A
SCALE AS SHOWN	
REF. No.	
DWG No. 1	

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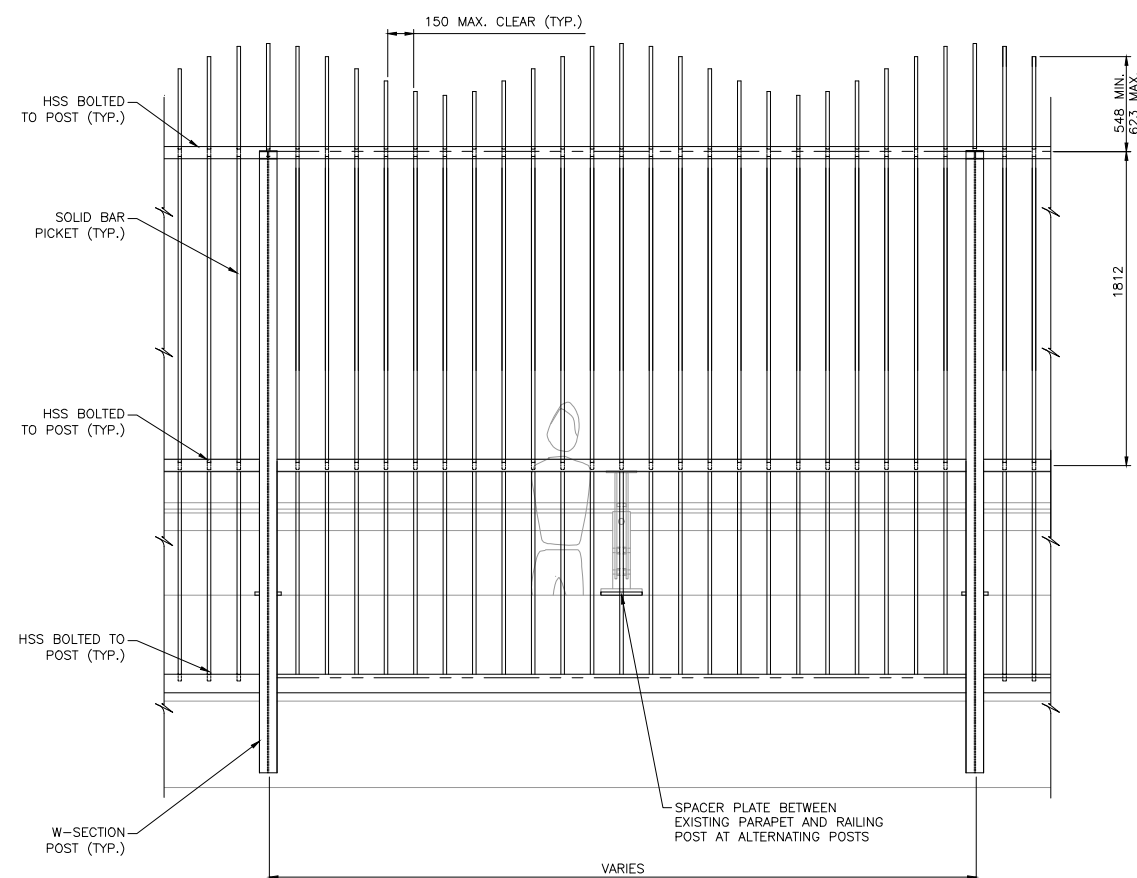
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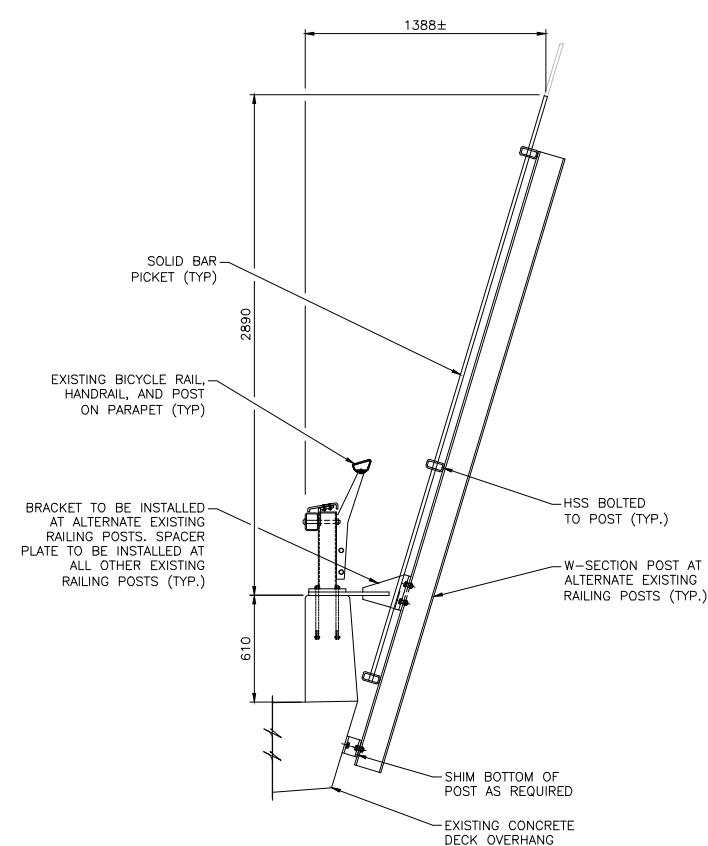
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REF. No.	
DWG No. 2	REV. A



SECTION - EXTERIOR BARRIER ALTERNATIVE 2, INTERIOR BARRIER ALTERNATIVE B
1:50



SECTION 2
1:20



DETAIL B
1:20

**NOT FOR
CONSTRUCTION**

NO.	REVISION	DATE	INIT.

NOTES:
1. DIMENSIONS ARE IN MILLIMETRES UNLESS OTHERWISE SHOWN. ELEVATIONS ARE IN METRES.

DRAFTING A.F.N
DESIGN ---
CHECKED BY ---
APPROVED BY ---

593



2013-T-104 (RN-13-04)
BURGOYNE BRIDGE REPLACEMENT
CITY OF ST. CATHARINES
MEANS PREVENTION BARRIER
ALTERNATIVE 2

CONSULTANT FILE No. -----
DATE YYYY-MM-DD
SCALE AS SHOWN
REF. No.
DWG No. 3
REV. A

APPENDIX C
COST ESTIMATES

Galvanized Exterior Barrier Total Cost

Total barrier length	666 m	Fabrication rate	16 hrs/pcs
Panel size (average)	4.1 m/panel	Installation rate	5 pcs/day
Total number of panels	162 pcs	Metal tonnage	51598 kg

Cost items	Quantity	Unit rate	Amount
Fabrication and shop work	2592 hrs	\$ 75.00 /hr	\$ 194,000.00
Galvanizing	51598 kg	\$ 2.00 /kg	\$ 103,000.00
Delivery cost	162 pcs	\$ 200.00 /pcs	\$ 32,000.00
Site erection costs	in hours: 264 hrs	\$ 800.00 /hr	\$ 211,000.00
	in days: 33 working days		
Equipment rental	1 sum	\$ 300,000.00	\$ 300,000.00
		Construction subtotal	\$ 840,000.00
		Material subtotal	\$ 397,000.00
		Exterior barrier subtotal	\$ 1,237,000.00
		40% Contingency	\$ 495,000.00
		Exterior barrier total	\$ 1,732,000.00
		Cost/m	\$ 5,200.00

Interior Barrier Total Cost

Total span length	333 m		
Panel size (average)	20 m/panel	Anchorage installation	10 days
Total number of panels	17 pcs	Metal tonnage	1407 kg
Border and intermediate cat	760 m	Installation rate	1 pcs/day

Cost items	Quantity	Unit rate	Amount
Freight	1 sum	\$ 4,000.00	\$ 4,000.00
Site erection costs	in hours: 216 hrs	\$ 600.00 /hr	\$ 130,000.00
	in days: 27 working days		
Equipment rental	1 sum	\$ 300,000.00	\$ 300,000.00
		Construction subtotal	\$ 434,000.00
		Material subtotal	\$ 178,000.00
		Interior barrier subtotal	\$ 612,000.00
		40% Contingency	\$ 245,000.00
		Interior barrier total	\$ 857,000.00
		Cost/m	\$ 2,600.00

Total cost

Exterior and Interior subtotal	\$ 1,849,000.00
40% Contingency	\$ 740,000.00
Total	\$ 2,589,000.00
Total cost/m	\$ 7,800.00

Aluminum Exterior Barrier Total Cost

Total barrier length	666 m	Fabrication rate	16 hrs/pcs
Panel size (average)	4.1 m/panel	Installation rate	5 pcs/day
Total number of panels	162 pcs	Metal tonnage	35783 kg

Cost items	Quantity	Unit rate	Amount
Fabrication and shop work	2592 hrs	\$ 90.00 /hr	\$ 233,000.00
Delivery cost	162 pcs	\$ 200.00 /pcs	\$ 32,000.00
Site erection costs	in hours: 264 hrs	\$ 800.00 /hr	\$ 211,000.00
	in days: 33 working days		
Equipment rental	1 sum	\$ 300,000.00	\$ 300,000.00
		Construction subtotal	\$ 776,000.00
		Material subtotal	\$ 424,000.00
		Exterior barrier subtotal	\$ 1,200,000.00
		40% Contingency	\$ 480,000.00
		Exterior barrier total	\$ 1,680,000.00
		Cost/m	\$ 5,000.00

Interior Barrier Total Cost

Total span length	333 m		
Panel size (average)	20 m/panel	Anchorage installation	10 days
Total number of panels	17 pcs	Metal tonnage	1407 kg
Border and intermediate cat	760 m	Installation rate	1 pcs/day

Cost items	Quantity	Unit rate	Amount
Freight	1 sum	\$ 4,000.00	\$ 4,000.00
Site erection costs	in hours: 216 hrs	\$ 600.00 /hr	\$ 130,000.00
	in days: 27 working days		
Equipment rental	1 sum	\$ 300,000.00	\$ 300,000.00
		Construction subtotal	\$ 434,000.00
		Material subtotal	\$ 178,000.00
		Interior barrier subtotal	\$ 612,000.00
		40% Contingency	\$ 245,000.00
		Interior barrier total	\$ 857,000.00
		Cost/m	\$ 2,600.00

Total cost

Exterior and Interior subtotal	\$ 1,812,000.00
40% Contingency	\$ 725,000.00
Total	\$ 2,537,000.00
Total cost/m	\$ 7,600.00

Cost Estimate - Exterior Barrier - Material Cost

Galvanized Steel						
Alternative 1: Cantilevered Pipes						
Item	Unit	Unit Cost	Quantity	Total Cost	Linear Cost (\$/m)	Comments
Pipe	m	\$ 11.10	12622	\$ 140,000.00	\$ 420.00	48mm OD, 190mm C/C spacing
Horizontal HSS	kg	\$ 5.00	26640	\$ 133,000.00	\$ 400.00	2 HSS per barrier
W-Section Post	kg	\$ 5.00	10490	\$ 52,000.00	\$ 160.00	Installed at every other existing pedestrian railing post. Half-height post.
Filler Plate	kg	\$ 5.00	1987	\$ 10,000.00	\$ 30.00	At all existing pedestrian posts without new bracket
Upper Bracket	kg	\$ 5.00	6600	\$ 33,000.00	\$ 100.00	Installed at every new barrier post
Lower Bracket	kg	\$ 5.00	5882	\$ 29,000.00	\$ 90.00	Installed at every new barrier post
Material subtotal				\$ 397,000.00	\$ 1,200.00	

Aluminum						
Alternative 1: Cantilevered Pipes						
Item	Unit	Unit Cost	Quantity	Total Cost	Linear Cost (\$/m)	Comments
Pipe	m	\$ 13.62	11419	\$ 156,000.00	\$ 470.00	60mm OD, 210mm C/C spacing
Horizontal HSS	kg	\$ 7.50	19980	\$ 150,000.00	\$ 450.00	2 HSS per barrier
W-Section Post	kg	\$ 7.50	8991	\$ 67,000.00	\$ 200.00	Installed at every other existing pedestrian railing post. Half-height post.
Filler Plate	kg	\$ 7.50	936	\$ 7,000.00	\$ 20.00	At all existing pedestrian posts without new bracket
Upper Bracket	kg	\$ 7.50	3108	\$ 23,000.00	\$ 70.00	Installed at every new barrier post
Lower Bracket	kg	\$ 7.50	2769	\$ 21,000.00	\$ 60.00	Installed at every new barrier post
Material subtotal				\$ 424,000.00	\$ 1,270.00	

Cost Estimate - Interior Barrier - Material Cost

Alternative 1: Steel Mesh Net						
Component	Unit	Unit Cost	Quantity	Total Cost	Linear Cost (\$/m)	Comments
Steel mesh net	m ²	\$ 75.00	1900	\$ 143,000.00	\$ 430.00	AISI 316 stainless steel, mesh size 180 mm
End bracket	pcs	\$ 200.00	34	\$ 7,000.00	\$ 20.00	Custom, stainless steel, every 10m at cable termination
Intermediate bracket	pcs	\$ 150.00	134	\$ 20,000.00	\$ 60.00	Custom, stainless steel, every 5m between cable attachments
Border cable	m	\$ 7.00	760	\$ 5,000.00	\$ 20.00	DIA 8, AISI 316 stainless steel, Fu = 52.8 kN
Turnbuckle	pcs	\$ 30.00	49	\$ 1,000.00	\$ 3.00	AISI 316 stainless steel
Cable end attachment	pcs	\$ 25.00	98	\$ 2,000.00	\$ 10.00	For DIA 8 cable, AISI 316
Material subtotal				\$ 178,000.00	\$ 543.00	

APPENDIX D
LIFE CYCLE COST ANALYSIS

Life Cycle Cost Analysis - Burgoyne Means Prevention Barrier

Site:	Burgoyne Bridge
Exterior barriers (total length)	666 m

Alternative 1: Galvanized		
Year	Activity	
0	New construction	
15	Picket repair: replacement and/or miscellaneous repair	10% of total length
30	Full replacement	
45	Picket repair: replacement and/or miscellaneous repair	10% of total length
60	Full replacement	
75	Picket repair: replacement and/or miscellaneous repair	10% of total length
90	Full replacement	
105	Picket repair: replacement and/or miscellaneous repair	10% of total length
120	Full replacement	
125	End of service life	

Alternative 2: Aluminum		
Year	Activity	
0	New construction	
20	Picket repair: replacement and/or miscellaneous repair	15% of total length
40	Full replacement	
60	Picket repair: replacement and/or miscellaneous repair	15% of total length
80	Full replacement	
100	Picket repair: replacement and/or miscellaneous repair	15% of total length
120	Full replacement	
125	End of service life	

Activity Cost Estimates

Alternative 1: Galvanized				
Activity	Quantity	Unit	Unit Cost (\$/Unit)	Cost (\$)
New Construction	-	-	-	\$ 1,732,000.00
Picket Repair	67	m	\$ 5,200.00	\$ 346,320.00
Full Replacement	-	-	-	\$ 1,732,000.00

Alternative 2: Aluminum				
Activity	Quantity	Unit	Unit Cost (\$/Unit)	Cost (\$)
New Construction	-	-	-	\$ 1,680,000.00
Picket Repair	100	m	\$ 5,000.00	\$ 499,500.00
Full Replacement	-	-	-	\$ 1,680,000.00

Discount Rate = 5.00%

Residual Value Analysis

Alternative	Replacement Year	Replacement Cost	Residual Year	Value at End of Life Cycle	Residual Value at End of Cycle	Residual Value at Year Zero
1	120	\$ 1,732,000.00	25	\$ 511,464.40	\$ (1,220,535.60)	\$ (3,498.12)
2	120	\$ 1,680,000.00	35	\$ 304,567.68	\$ (1,375,432.32)	\$ (3,942.06)

Present Value Analysis (Level 3)

Year	Alternative 1: Galvanized		Alternative 2: Aluminum	
	Cost	Present Value (PV)	Cost	Present Value (PV)
0	\$ 1,732,000.00	\$ 1,732,000.00	\$ 1,680,000.00	\$ 1,680,000.00
15	\$ 346,320.00	\$ 166,585.84	\$ -	\$ -
20	\$ -	\$ -	\$ 499,500.00	\$ -
30	\$ 1,732,000.00	\$ 400,745.74	\$ -	\$ -
40	\$ -	\$ -	\$ 1,680,000.00	\$ 238,636.75
45	\$ 346,320.00	\$ 38,544.21	\$ -	\$ -
60	\$ 1,732,000.00	\$ 92,723.53	\$ 499,500.00	\$ 26,740.99
75	\$ 346,320.00	\$ 8,918.26	\$ -	\$ -
80	\$ -	\$ -	\$ 1,680,000.00	\$ 33,897.32
90	\$ 1,732,000.00	\$ 21,454.13	\$ -	\$ -
100	\$ -	\$ -	\$ 499,500.00	\$ 3,798.44
105	\$ 346,320.00	\$ 2,063.48	\$ -	\$ -
120	\$ 1,732,000.00	\$ 4,964.00	\$ 1,680,000.00	\$ 4,814.97
125	\$ -	\$ -	\$ -	\$ -
Total Present Value (TPV) =		\$ 2,467,999.20	\$ 1,987,888.47	
Residual Value (RV) =		\$ (3,498.12)	\$ (3,942.06)	
Net Present Value (NPV) =		\$ 2,465,000.00	\$ 1,984,000.00	

Life Cycle Cost Analysis - Burgoyne Means Prevention Barrier

Site:	Burgoyne Bridge	
Interior barrier (total length)	333	m

Steel Mesh Net	
Year	Activity
0	New construction
38	Partial repair & maintenance: replacement and/or miscellaneous repair 10% of total length
75	Full replacement
113	Partial repair & maintenance: replacement and/or miscellaneous repair 10% of total length
125	End of service life

Activity Cost Estimates

Steel Mesh Net				
Activity	Quantity	Unit	Unit Cost (\$/Unit)	Cost (\$)
New Construction	-	-	-	\$ 857,000.00
Repair	33	m	\$ 2,600.00	\$ 86,580.00
Full Replacement	-	-	-	\$ 857,000.00

Discount Rate =	5.00%
-----------------	-------

Residual Value Analysis

System	Replacement Year	Replacement Cost	Residual Year	Value at End of Life Cycle	Residual Value at End of Cycle	Residual Value at Year Zero
Steel mesh net	120	\$ 857,000.00	25	\$ 253,074.48	\$ (603,925.52)	\$ (1,730.88)

Present Value Analysis (Level 3)

Year	Steel Mesh Net	
	Cost	Present Value (PV)
0	\$ 857,000.00	\$ 857,000.00
37.5	\$ 86,580.00	\$ 13,893.73
75	\$ 857,000.00	\$ 22,069.04
113	\$ 86,580.00	\$ 357.78
125	\$ -	\$ -
Total Present Value (TPV) =		\$ 893,320.55
Residual Value (RV) =		\$ (1,730.88)
Net Present Value (NPV) =		\$ 892,000.00

MEMORANDUM

Appendix 3: PW 24-2019

Subject: Update on Need for Means Protection on Infrastructure in St. Catharines

Date: April 1, 2019

To: Public Works Committee

From: M. Mustafa Hirji, Medical Officer of Health & Commissioner (Acting)

Pursuant to Regional Council's request during approval of the Capital Budget at their meeting of Feb. 28, 2019, this memo provides an update as well as my current recommendation on the need for means protection at the element of infrastructure in St. Catharines where there have been several deaths by suicide.

Background and Current Situation

From October 2018 to December 2018, there were three deaths by suicide and at least one significant attempt from the infrastructure element in St. Catharines. In response to this, at PHSSC on Jan. 8, 2019, PHD 03-2019 recommended proceeding with planning to build a barrier to prevent deaths by suicide, while reserving a final decision until later in the year.

Councillors identified that the risk of deaths by suicide and urgency for a barrier was too great to defer the final decision. Committee therefore approved building of the barrier, which was subsequently endorsed by Council on Jan. 17, 2019. Council also amended the proposed Capital Budget to include a project budget to build this barrier, with that budget approved by Council on Feb. 28, 2019.

Since the Jan. 8, 2019 meeting, there have been three additional deaths by suicide in less than three months.

The rate of deaths by suicide at this location has therefore continued these past three months at the rate from the previous three months.

This rate, slightly greater than one death per month, would be the second highest in North America were it to become the new norm.

Scientific Evidence for Barriers

Recent scientific research finds that barriers are the most effective strategy to prevent deaths by suicide from falling from infrastructure:

- One 2015 review of all published research on suicide prevention identified means protection measures (barriers being the means protection barrier when falling

from infrastructure) to be the most effective strategy for suicide prevention, at least five time more effective than any other strategy¹.

- One 2014 review conducted by the McMaster Health Forum (Hamilton, Ontario) similarly found means protection to be in the set of most effective strategies for suicide prevention.²

As well, scientific evidence consistently shows that barriers do not just lead to people dying by suicide at alternate locations:

- A 2016 and a 2013 review combining the results of all previously published studies showed that while a barrier may cause some individuals to attempt to die by suicide by another means or at another location, many persons are prevented entirely from dying by suicide.^{3,4}
- A 2017 study showed that a barrier erected to prevent suicide from a location in Toronto led to effective elimination of deaths at that location, with no increase in deaths by other causes or at other locations—i.e these deaths were completely prevented.⁵

Cost Effectiveness of Barriers

Members of Council have debated the cost effectiveness of a barrier as compared to other potential strategies.

It should be emphasized that the barrier is a capital expenditure, and most other measures Council might fund would be operating expenditures. Money budgeted for the barrier cannot be reallocated to funding different operating measures. A complementary process is underway to examine possible operating expenditures through report *PHD 08-2019*.

Nonetheless, for Council's information, I am sharing some scientific evidence cost effectiveness here.

¹ Jane Pirkis, Lay San Too, Matthew J Spittal, Karolina Kryszynska, Jo Robinson, Yee Tak Derek Cheung. "Interventions to reduce suicides at suicide hotspots: a systematic review and meta-analysis". *Lancet Psychiatry*. 2015; 2: 994–1001. doi:10.1016/S2215-0366(15)00266-7

² Hirji MM, Wilson MG, Yacoub K, Bhuiya A. Rapid Synthesis: Identifying Suicide-prevention Interventions. Hamilton, Canada: McMaster Health Forum, 30 June 2014.

³ Gil Zalsman *et al.* *Suicide prevention strategies revisited: 10-year systematic review. Lancet Psychiatry* 2016; 3: 646–59 Published Online June 8, 2016 [http://dx.doi.org/10.1016/S2215-0366\(16\)30030-X](http://dx.doi.org/10.1016/S2215-0366(16)30030-X)

⁴ Jane Pirkis, Matthew J Spittal, Georgina Cox, Jo Robinson, Yee Tak Derek Cheung, and David Studdert. The effectiveness of structural interventions at suicide hotspots: a meta-analysis. *International Journal of Epidemiology* 2013;42:541–548. doi:10.1093/ije/dyt021

⁵ Sinyor M, Schaffer A, Redelmeier DA, et al. Did the suicide barrier work after all? Revisiting the Bloor Viaduct natural experiment and its impact on suicide rates in Toronto. *BMJ Open* 2017;7:e015299. doi:10.1136/bmjopen-2016-015299

A rigorous and precise comparison of costs is not possible here given that evidence of cost-effectiveness comes from different jurisdictions and different local contexts. Direct comparison of these costs is not precise. Nonetheless, in the table below are some rough approximations of cost-effectiveness that give a sense of the scale of cost of various measures.

Suicide Prevention Measure	Proportion of Deaths Prevented	Cost per Life Saved
<i>Media Reporting Guidelines</i>	1% ⁶	\$1,000 ⁷
<i>Means Prevention Barriers</i>	86% ⁸	\$50,000 ⁹
<i>Patrolling Attendant Intervening</i>	No Evidence Found	\$135,000 ¹⁰
<i>Primary Care Mental Health Intervention</i>	2.5% ¹¹	\$244,000 ¹²
<i>School-based Suicide Prevention</i>	1% ¹³	\$1,750,000 ¹⁴

As noted, the cost-effectiveness depends greatly on the local conditions. E.g. the media reporting guidelines cost is assuming there is no cycle of contagion fueled in part by media reporting. Were that to exist, significantly more than 1% of deaths might be prevented, and the cost per life saved would fall much lower.

Similarly, the \$50,000 per life saved for a barrier is assuming a rate of one death every two years over an assumed 80 year lifespan for the \$4 million infrastructure. That is significantly less often than the rate of 12 per year that has been observed the past six months, in which case cost-effectiveness would be closer to \$2,000 per life saved.

⁶ Mark Sinyor *et al.* *Media Guidelines for Reporting on Suicide: 2017 Update of the Canadian Psychiatric Association Policy Paper*. 2017.

⁷ World Health Organization. *Preventing suicide: a global imperative*. 2014. Assumed minimum 25 life years saved from prevented death by suicide.

⁸ Zalsman *et al.*

⁹ Assumption of 1 attempted death every 2 years, over 80 years, for a cost of \$4 million.

¹⁰ Cost of minimum wage employees (\$14 per hour) to cover 24 hours a day for an entire year. Assumed 10% payroll-related costs.

¹¹ Ingrid Zechmeister, Reinhold Kilian, David McDaid and the MHEEN. "Is it worth investing in mental health promotion and prevention of mental illness? A systematic review of the evidence from economic evaluations group". *BMC Public Health* 2008, 8:20 doi:10.1186/1471-2458-8-20

¹² Zechmeister *et al.* \$183,000 US converted to \$244,000 Canadian.

¹³ S. Ahern *et al.* "A cost-effectiveness analysis of school-based suicide prevention

Programmes. *European Child & Adolescent Psychiatry*. 2018. <https://doi.org/10.1007/s00787-018-1120-5>

¹⁴ Ahern *et al.* 47,017 Euros converted to \$70,000 per attempt prevented. Factored in that only 1% of attempts are prevented, and attempts result in death 4% to 25% of the time.

Nonetheless, even with a very modest rate of death at the infrastructure in question, a barrier would be significantly more cost effective than most other strategies.

Recommendation

In considering my recommendation, I have again consulted with Dr. Mark Sinyor, Psychiatrist (Sunnybrook Hospital) and Assistant Professor of Psychiatry (University of Toronto) who is an international expert in both suicide contagion and suicide prevention.

Deaths by suicide at the location in St. Catharines have continued at a very frequent rate (effectively the second highest rate in North America) over the past three months. There is now a continuous six month trend.

There is no science to predict whether a location is likely to remain a suicide magnet or not. However, the longer the trend of frequent deaths, the more likely that a location will become a suicide magnet. Given the high profile and significant discourse associated with deaths over the past six months, it is very likely that the location in St. Catharines is now associated with suicide with much of the population. Therefore, it can be expected that some deaths will continue even if measures to prevent further contagion are taken. Even a 10-fold decline in the rate of deaths would leave this infrastructure as a significant suicide magnet.

Barriers are highly effective at preventing deaths by suicide, and they are also highly cost-effective, and much more so than other measures.

My recommendation, therefore, is that construction of a barrier should proceed. It will make a significant reduction to deaths by suicide, is the most cost-effective way to address the recent cycle of deaths by suicide, and demonstrate to the Niagara community Council's and Niagara Region's resolve to address mental illness.

Respectfully submitted and signed by

M. Mustafa Hirji, MD MPH FRCPC
Medical Officer of Health & Commissioner (Acting)

Minute Item No. 5.1

PHD 08-2019

Increasing Capacity for Suicide Prevention Efforts in Niagara

1. That Regional Council **APPROVE** the creation of two full time equivalent positions in Public Health & Emergency Services to support mental health resiliency and community capacity-building, with these positions having a dedicated focus on addressing the burden of suicide in Niagara for two years.
2. That the ongoing operating budget requirements for this initiative **BE REFERRED** for consideration as part of the 2020 budget process.
3. That staff **BE DIRECTED** to work with community partners to ensure that there are trained volunteer personnel at the location forthwith, that expenses be included in the budget and that funding be sought from the provincial government for this initiative.

Minute Item No. 5.2

COM 13-2019

Actions to Inform Procurement Process of EarlyON Child and Family Centre

That Report COM 13-2019, dated April 16, 2019, respecting Actions to Inform Procurement Process of EarlyON Child and Family Centre, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That all current service provider agencies (Appendix A) continue to operate EarlyON Child and Family Centres until the conclusion of the procurement process, and that staff **BE AUTHORIZED** to negotiate any and all required amendments and documentation related to existing agreements for current service provider agencies;
2. That the Negotiated Request for Proposal (NRFP) process **BE INITIATED** in Q2 2019 and that staff **BE AUTHORIZED** to enter into negotiations with the selected proponents based on the NRFP process, subject to confirmation of provincial funding;
3. That the evaluation scoring matrix (Appendix B), to be used to score NRFP submissions from potential service providers, **BE APPROVED**;
4. That staff **BE AUTHORIZED** to negotiate with Bethlehem Housing and Support Services as the sole sourced EarlyON service provider to operate an EarlyON Child and Family Centre specifically for high needs families in Niagara;
5. That staff **BE AUTHORIZED** to negotiate with Fort Erie Native Friendship Centre as the sole sourced EarlyON service provider to operate a culturally relevant, Indigenous-led EarlyON Child and Family Centre in Niagara;

6. That staff **BE AUTHORIZED** to negotiate with Centre de santé communautaire Hamilton/Welland as the sole sourced EarlyON service provider to operate a French-language EarlyON Child and Family Centre in Niagara;
7. That staff **BE AUTHORIZED** to negotiate with Sault Ste Marie Innovation Centre to license the use of KEyON data collection software in all EarlyON Child and Family Centres across Niagara; and
8. That the Commissioner of Community Services, or their designate, **BE AUTHORIZED** and directed to execute any and all documents required to implement sections 1, 2, 4, 5, 6 and 7 of the Recommendations in Report COM 13-2019.

Minute Item No. 5.3

COM 16-2019

Emergency Shelter Funding Adjustment

That Report COM 16-2019, dated April 16, 2019, respecting Emergency Shelter Funding Adjustments, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the \$1,144,861 increase in emergency shelter homelessness contracts, from \$6,938,250 (initially approved in COM 16-2017) to \$8,083,111 for the (33 month) period July 1, 2017 to March 31, 2020 **BE APPROVED**; and
2. That staff **BE AUTHORIZED** to execute any required amendments and documentation related to existing agreements for current service providers of emergency shelter to implement the increases in funding.

Minute Item No. 5.4

NRH 1-2019

Budget Adjustment – Social Housing Apartment Improvement Program (SHAIP)

That Report NRH 1-2019, dated January 11, 2019, respecting Budget Adjustment – Social Housing Apartment Improvement Program (SHAIP) **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That a gross capital budget adjustment in the amount of \$1,075,475 gross and \$0 net **BE RECEIVED** and **INITIATED** for the Social Housing Apartment Improvement Program and that the adjustment **BE FUNDED** by Ministry of Housing - SHAIP grant.

Minute Item No. 6

Consent Items for Information

That the following items **BE RECEIVED** for information:

PHD-C 01-2019

Number of Persons Impacted by a Death by Suicide

COM 15-2019

Housing and Homelessness Action Plan Update 2018

COM 18-2019

Senior Services Homes - Volunteer Report

COM 19-2019

Medical Directors Annual Report 2018 - Long-Term Care Homes

CWCD 112-2019

2019 alpha Boards of Health Fitness Challenge

CWCD 131-2019

Opioid Work Update

**THE REGIONAL MUNICIPALITY OF NIAGARA
PUBLIC HEALTH & SOCIAL SERVICES COMMITTEE
OPEN SESSION**

**PHSSC 04-2019
Tuesday, April 16, 2019
Council Chamber
Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON**

Committee: Butters, Chiocchio (Committee Co-Chair), Darte, Diodati, Greenwood (Committee Co-Chair), Heit, Insinna, Ip, Jordan, Rigby, Sendzik, Villella, Whalen

Absent/Regrets: Regional Chair Bradley, Bellows, Gibson, Nicholson

Staff: A. Alfieri-Maiolo, Director, Clinical Services, D. Barnhart, Executive Officer to the Regional Chair, A. Biscaro, Director, Family Health, C. Cousins, Director, Homelessness and Community Engagement, Dr. A. Feller, Associate Medical Officer of Health, Dr. M. Hirji, Acting Medical Officer of Health, A. Jugley, Commissioner, Community Services, H. Koning, Director, Senior Services, K. Lotimer, Legislative Coordinator, A.-M. Norio, Regional Clerk, J. Sinclair, Homelessness Action Plan Advisor, R. Tripp, Acting Chief Administrative Officer

1. CALL TO ORDER

Co-Chair Greenwood called the meeting to order at 2:00 p.m.

2. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

3. PRESENTATIONS

There were no presentations.

4. DELEGATIONS

4.1 PHD 08-2019 Increasing Capacity for Suicide Prevention Efforts in Niagara (Agenda Item 5.1)

Committee Co-Chair Greenwood advised the delegation request was received after the deadline and would need to be considered by Committee.

Moved by Councillor Whalen
Seconded by Councillor Ip

That Stephanie Farquharson and Wendi Duggan, Niagara United, **BE PERMITTED** to appear before the Public Health and Social Services Committee as a delegate respecting PHD 08-2019, Increasing Capacity for Suicide Prevention (Agenda Item 5.1).

Carried

4.1.1 Stephanie Farquharson and Wendi Duggan, Niagara United

Stephanie Farquharson and Wendi Duggan, Niagara United, appeared before Committee respecting PHD 08-2019, Increasing Capacity for Suicide Prevention Efforts in Niagara (Item 5.1). Ms. Farquharson and Ms. Duggan highlighted the importance of training and education focused on Niagara's youth, improved data collection and the need to initiate training and education components as quickly as possible.

5. ITEMS FOR CONSIDERATION

5.1 PHD 08-2019

Increasing Capacity for Suicide Prevention Efforts in Niagara

Renata Faber, Manager, Chronic Disease and Injury Prevention, Lisa Panetta, Manager, Mental Health and Stacey Terry, Chair of the Niagara Suicide Prevention Coalition, provided Committee members with information respecting Increasing Capacity for Suicide Prevention Efforts in Niagara. Topics of the presentation included:

- Reminders around discussing suicide
- Statistics on suicide in Niagara
- Considerations
- Suicide prevention framework
- Recommendations for Niagara Region Public Health and Emergency Services

Moved by Councillor Ip
Seconded by Councillor Darté

That Report PHD 08-2019, dated April 16, 2019, respecting Increasing Capacity for Suicide Prevention Efforts in Niagara, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Regional Council **APPROVE** the creation of two full time equivalent positions in Public Health & Emergency Services to support mental health resiliency and community capacity-building, with these positions having a dedicated focus on addressing the burden of suicide in Niagara for two years; and
2. That the ongoing operating budget requirements for this initiative **BE REFERRED** for consideration as part of the 2020 budget process.

Moved by Councillor Insinna
Seconded by Councillor Darté

That the motion **BE AMENDED** to include Clause 3 as follows:

3. ***That staff BE DIRECTED to work with community partners to ensure that there are trained volunteer personnel on the infrastructure forthwith, that expenses be included in the current budget and that funding be sought from the provincial government for this initiative.***

Recorded Vote:

Yes (10): Butters, Chiochio, Darté, Diodati, Heit, Insinna, Jordan, Rigby, Sendzik, Villella

No (3): Greenwood, Ip, Whalen

Carried

The recommendations were voted on separately as follows:

1. That Regional Council **APPROVE** the creation of two full time equivalent positions in Public Health & Emergency Services to support mental health resiliency and community capacity-building, with these positions having a dedicated focus on addressing the burden of suicide in Niagara for two years.

Recorded Vote:

Yes (13): Butters, Chiocchio, Dart, Diodati, Greenwood, Heit, Insinna, Ip, Jordan, Rigby, Sendzik, Villella, Whalen.

No (0).

Carried

2. That the ongoing operating budget requirements for this initiative **BE REFERRED** for consideration as part of the 2020 budget process.

Carried

3. That staff **BE DIRECTED** to work with community partners to ensure that there are trained volunteer personnel at the location forthwith, that expenses be included in the budget and that funding be sought from the provincial government for this initiative.

Recorded Vote:

Yes (11): Butters, Chiocchio, Dart, Diodati, Greenwood, Heit, Insinna, Jordan, Rigby, Sendzik, Villella.

No: (2): Ip, Whalen.

Carried

Councillor Information Requests:

That the staff invite Niagara Parks Commission to participate in the training opportunities being offered. Councillor Sendzik.

5.2 COM 13-2019

Actions to Inform Procurement Process of EarlyON Child and Family Centre

Moved by Councillor Rigby
Seconded by Councillor Butters

That Report COM 13-2019, dated April 16, 2019, respecting Actions to Inform Procurement Process of EarlyON Child and Family Centre, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That all current service provider agencies (Appendix A) continue to operate EarlyON Child and Family Centres until the conclusion of the procurement process, and that staff **BE AUTHORIZED** to negotiate any and all required amendments and documentation related to existing agreements for current service provider agencies;
2. That the Negotiated Request for Proposal (NRFP) process **BE INITIATED** in Q2 2019 and that staff **BE AUTHORIZED** to enter into negotiations with the selected proponents based on the NRFP process, subject to confirmation of provincial funding;
3. That the evaluation scoring matrix (Appendix B), to be used to score NRFP submissions from potential service providers, **BE APPROVED**;
4. That staff **BE AUTHORIZED** to negotiate with Bethlehem Housing and Support Services as the sole sourced EarlyON service provider to operate an EarlyON Child and Family Centre specifically for high needs families in Niagara;
5. That staff **BE AUTHORIZED** to negotiate with Fort Erie Native Friendship Centre as the sole sourced EarlyON service provider to operate a culturally relevant, Indigenous-led EarlyON Child and Family Centre in Niagara;
6. That staff **BE AUTHORIZED** to negotiate with Centre de santé communautaire Hamilton/Welland as the sole sourced EarlyON service provider to operate a French-language EarlyON Child and Family Centre in Niagara;
7. That staff **BE AUTHORIZED** to negotiate with Sault Ste Marie Innovation Centre to license the use of KEYON data collection software in all EarlyON Child and Family Centres across Niagara; and

8. That the Commissioner of Community Services, or their designate, **BE AUTHORIZED** and directed to execute any and all documents required to implement sections 1, 2, 4, 5, 6 and 7 of the Recommendations in Report COM 13-2019.

Carried

5.3 COM 16-2019

Emergency Shelter Funding Adjustments

Moved by Councillor Insinna
Seconded by Councillor Diodati

That Report COM 16-2019, dated April 16, 2019, respecting Emergency Shelter Funding Adjustments, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the \$1,144,861 increase in emergency shelter homelessness contracts, from \$6,938,250 (initially approved in COM 16-2017) to \$8,083,111 for the (33 month) period July 1, 2017 to March 31, 2020 **BE APPROVED**; and
2. That staff **BE AUTHORIZED** to execute any required amendments and documentation related to existing agreements for current service providers of emergency shelter to implement the increases in funding.

Carried

5.4 NRH 1-2019

Budget Adjustment - Social Housing Apartment Improvement Program (SHAIP)

Moved by Councillor Villella
Seconded by Councillor Insinna

That Report NRH 1-2019, dated January 11, 2019, respecting Budget Adjustment – Social Housing Apartment Improvement Program (SHAIP) **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That a gross capital budget adjustment in the amount of \$1,075,475 gross and \$0 net **BE RECEIVED** and **INITIATED** for the Social Housing Apartment Improvement Program and that the adjustment **BE FUNDED** by Ministry of Housing - SHAIP grant.

Carried

6. CONSENT ITEMS FOR INFORMATION

Moved by Councillor Heit
Seconded by Councillor Whalen

That the following items **BE RECEIVED** for information:

PHD-C 01-2019

Number of Persons Impacted by a Death by Suicide

COM 15-2019

Housing and Homelessness Action Plan Update 2018

COM 18-2019

Senior Services Homes - Volunteer Report

COM 19-2019

Medical Directors Annual Report 2018 - Long-Term Care Homes

CWCD 112-2019

2019 aPHa Boards of Health Fitness Challenge

CWCD 131-2019

Opioid Work Update

Carried

7. OTHER BUSINESS

7.1 Canadian Alliance to End Homelessness

Councillor Ip enquired as to whether Niagara Region is a member of the Canadian Alliance to End Homelessness (CAEH). Jeffrey Sinclair, Homelessness Action Planner, advised that the CAEH is a national movement to end homelessness and as such does not provide membership. Various initiatives offered by the CAEH, such as Built for Zero Canada do provide membership, although an opportunity for the Niagara Region to join Built for Zero Canada is not currently available. Niagara Region and its funded homelessness services providers continue to participate in the CAEH training and technical assistance program. Mr. Sinclair advised that staff regularly communicate with the CAEH regarding upcoming opportunities and have expressed an interest in participating in Built for Zero Canada if such an opportunity arises.

8. CLOSED SESSION

There were no closed session items.

9. NEXT MEETING

The next meeting will be held on Tuesday, May 7, 2019, at 2:00 p.m. in the Council Chamber, Regional Headquarters.

10. ADJOURNMENT

There being no further business, the meeting adjourned at 3:50 p.m.

Councillor Greenwood
Committee Co-Chair

Councillor Chiocchio
Committee Co-Chair

Kelly Lotimer
Legislative Coordinator

Ann-Marie Norio
Regional Clerk

Increasing Capacity for Suicide Prevention Efforts

Public Health and Social Services Committee

Presentation Outline

- Reminders around discussing suicide
- Considerations
- Suicide prevention framework
- Recommendations for NRPH & ES

Language is Important

- Avoid specific and graphic language that includes means and/or location
- Avoid ascribing simple or singular reasons for suicide. Suicide is complex.
- Use appropriate language e.g. “died by suicide”, “suicide death”

PHD 03-2019 (January 8, 2019)

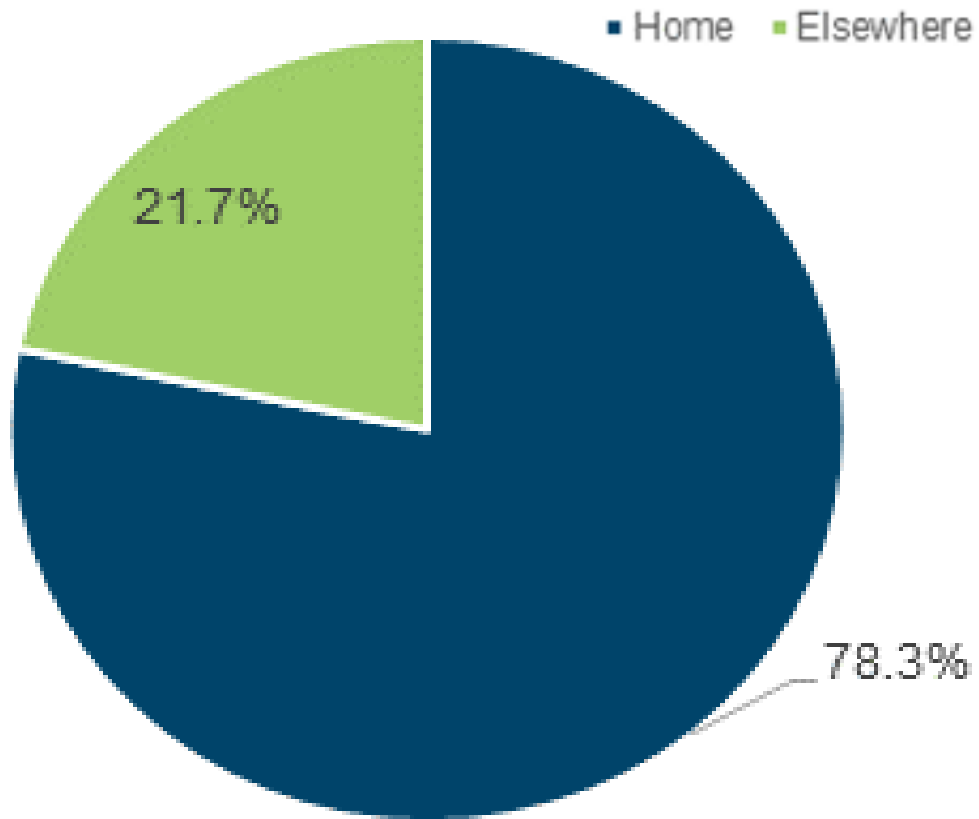
Regional Council as the Board of Health **ENDORSE** the proposed framework for preventing suicides on public infrastructure

To implement this framework, Regional Council as the Board of Health **DIRECT** staff to develop and report back in spring 2019 with detailed cost-estimates and budget options for:

- a. Suicide identification/intervention training
- b. Suicide risk assessment capacity-building
- c. Support for a Mental Health Hub/Clubhouse in St. Catharines

That staff **BE DIRECTED** to bring a report back...proposing a framework for preventing death by suicide through other methods.

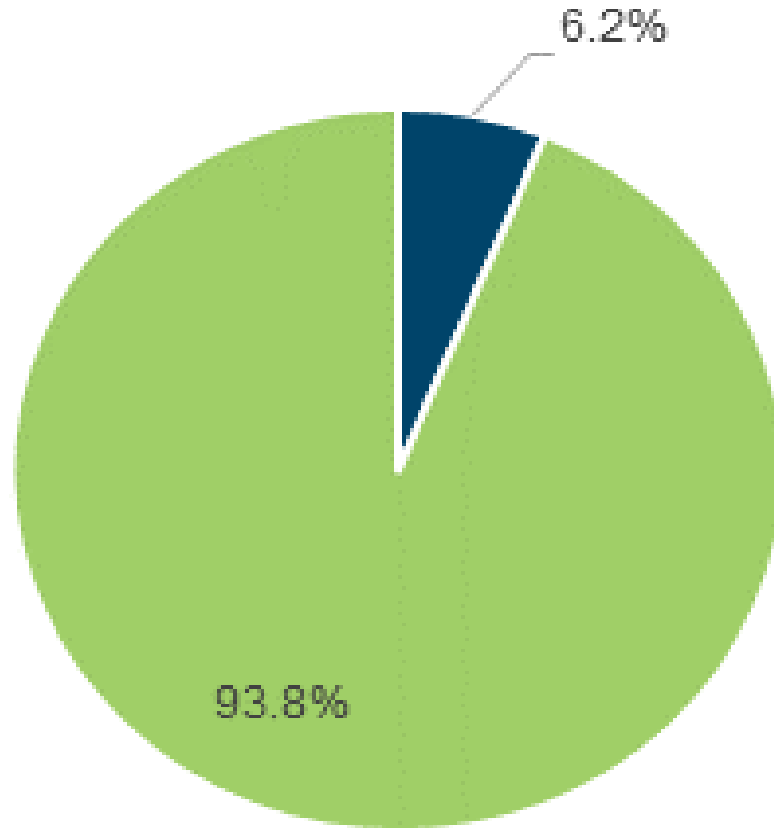
Data Considerations



In Canada, more than **90%** of those who died by suicide were living with a **mental health problem or illness.**

Most people who live with a mental illness do not attempt nor die by suicide

Data Considerations



■ Falling from a height ■ Other

Must consider a **wide range of interventions** as restricting means is not always possible

Framework for Suicide Prevention

Areas of suicide prevention include

- Public awareness
- Restricting and deterring means
- Increasing opportunities for help seeking behaviours
- Increasing probability of intervention
- Enhancing capacity of the mental health system

Public Awareness

- Media reporting guidelines
- **Raise awareness about suicide and suicide prevention strategies**

Restricting and Deterring Means

- Barriers on public infrastructure
- Gun control
- Restricted access to pharmaceuticals
- Other means restrictions
- Individual means restriction as follow up to suicide risk assessment

Increasing Opportunities for Help Seeking

- Signs and phones
- Crisis lines
- Walk in crisis counselling
- School-based programs
- **Staffed sanctuary**

Increasing Probability of Intervention

- Surveillance cameras
- Police patrols
- **Suicide awareness and intervention training**

Enhancing Capacity of the Mental Health System

- Treatment of mental illness
- **Increasing suicide risk assessment**
- Mental health service coordination

Niagara Suicide Prevention Coalition

NSPC was formed in response to increased deaths by suicide in the Niagara region

NSPC members include dozens of organizations, service providers and community-minded individuals

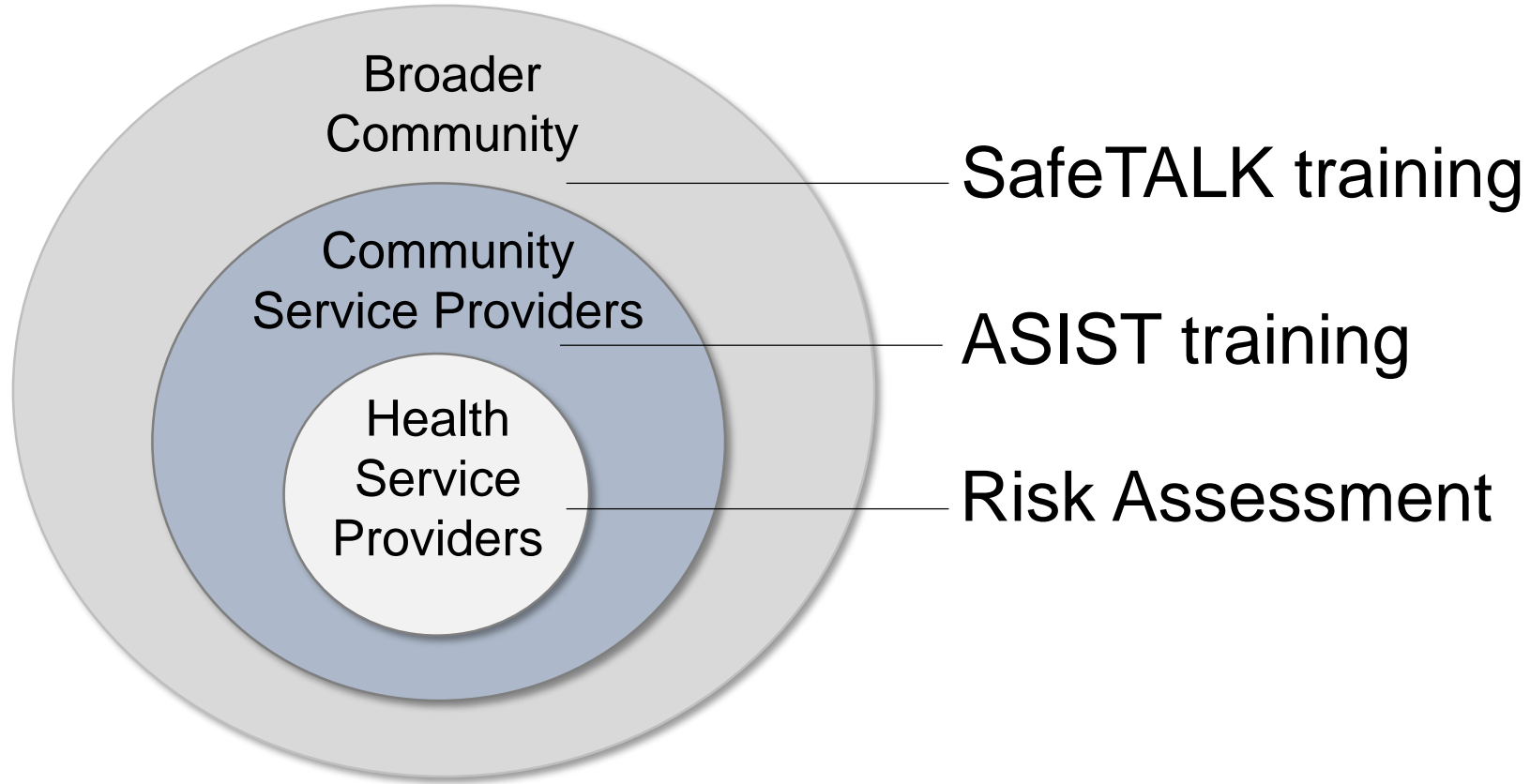
NSPC brings stakeholders together, focuses on protective factors, coordinates efforts and is a leader in suicide education and training for Niagara

Recommendations

Boost the capacity of the NSPC and the community by

- Sharing latest data, trends, research and best practice interventions
- Increasing gatekeeper training efforts
- Supporting health service providers to implement a common suicide risk assessment
- Developing a sustainability plan

Recommendations



Financial Implications

2 FTEs over 2 years - Focus on health promotion including training	\$348,844
1000 individuals SafeTALK trained - Staff certification (to become facilitators) - Administrative costs - Train the trainers for partner organizations	\$14,246
200 individuals ASIST trained - Staff certification (to become facilitators) - Administrative costs	\$30,528
Suicide Risk Assessment forum	\$5,597
Total	\$399,215

Subject: Increasing Capacity for Suicide Prevention Efforts in Niagara

Report to: Public Health and Social Services Committee

Report date: Tuesday, April 16, 2019

Recommendations

1. That Regional Council **APPROVE** the creation of 2 full time equivalent positions in Public Health & Emergency Services to support mental health resiliency and community capacity-building, with these positions having a dedicated focus on addressing the burden of suicide in Niagara for 2 years.
2. That the ongoing operating budget requirements for this initiative **BE REFERRED** for consideration as part of the 2020 budget process.

Key Facts

- Suicide is complex with many contributors. The best scientific evidence and expertise indicates that suicide can be prevented only through a comprehensive, multi-pronged approach.
- In January 2019, in addition to approving a means prevention initiative at one location with several deaths by suicide, Council directed staff to develop a broader proposal for suicide prevention, with that proposal to consider identification/intervention training, suicide risk assessment capacity-building, and a Mental Health Hub/Clubhouse in St. Catharines
- Niagara has an existing Suicide Prevention Coalition (NSPC) consisting of community partners and service agencies. This group does not have sustainable funding but has done foundational work towards community prevention.
- Through use of a comprehensive suicide prevention framework, current activities by the NSPC, Niagara Region, and others were examined and a gap analysis performed identifying initiatives that would have the most impact on reducing deaths by suicide. These initiatives are recommended for implementation.
- These initiatives require 2 FTEs and associated training at a cost totaling \$399,215 over two years to implement and will significantly enhance the community's capacity for a suicide safer Niagara.
- A funding application was submitted to the province for this request. If the application is not approved, staff will attempt to fund the 2019 operating budget impact of \$111,000 from any operating surplus that may arise in other areas of the department.

Financial Considerations

There is very little funding in Niagara dedicated to suicide prevention.

The Chronic Disease and Injury Prevention division allocates 0.5 FTE specifically to suicide prevention work. This health promoter provides Mental Health First Aid training and suicide prevention training (safeTALK), and represents Public Health & Emergency Services (NRPH & ES) on the Niagara Suicide Prevention Coalition (NSPC).

To dedicate focus on suicide prevention, it is recommended that 2.0 full-time FTEs for 2 years to implement suicide intervention training and a community forum at a total cost of \$399,215.

Table 1. Proposed Budget Implications for Suicide Prevention

2 FTEs (over two years) <ul style="list-style-type: none"> - Health promoter - Training specialist 	\$348,844
1000 individuals SafeTALK trained over two years <ul style="list-style-type: none"> - Staff certification (to become facilitators) - Manuals - Venue and administrative costs - Five train the trainers within organizations outside of NRPH & ES 	\$14,246
200 individuals Applied Suicide Intervention Skills Training (ASIST) trained over two years <ul style="list-style-type: none"> - Staff certification (to become facilitators) - Manuals - Facilitator costs - Venue and administrative costs - Reimbursement of Distress Centre for additional facilitators 	\$30,528
Suicide Risk Assessment forum	\$5,597
Total	\$399,215

After these two years, ongoing work will continue to sustain community capacity and build mental health resiliency across Niagara, but with greater focus on the full gamut of mental health and addictions as well as in early child hood and youth.

The 2019 approved operating budget does not include any funds for this work. Through the Annual Service Plan and Budget Submission (*PHD 05-2019*), the Board of Health has applied for base funding from the Province to implement this initiative. We will not know until later in the calendar year whether this funding request is approved or not. Given the provincial government's emphasis on balancing the budget and restraining health sector spending, staff is unsure that any funding requests will be approved.

Nonetheless, given the community interest and local urgency to address deaths by suicide, staff is recommending that the initiative outlined in this report proceed. Should the Province not fund this request, staff will attempt to fund the 2019 estimated operating budget impact of \$111,000 from any operating surplus that may arise in other areas of the department. If it is determined during the remainder of 2019 that these costs cannot be offset by surpluses in other areas of the department, staff will return to Council with options including a budget amendment request in order to fund from Regional reserves, or to end the initiative until a sustainable funding source is identified through the 2020 budget process.

Analysis

Self-harm is the second most common cause of injury-related death in Niagara (approximately 18% of all injury-related deaths). For each death by suicide, there are an estimated five self-inflicted injury hospitalizations, 25 to 30 suicide attempts and many more people impacted by any loss.^{1, 2}

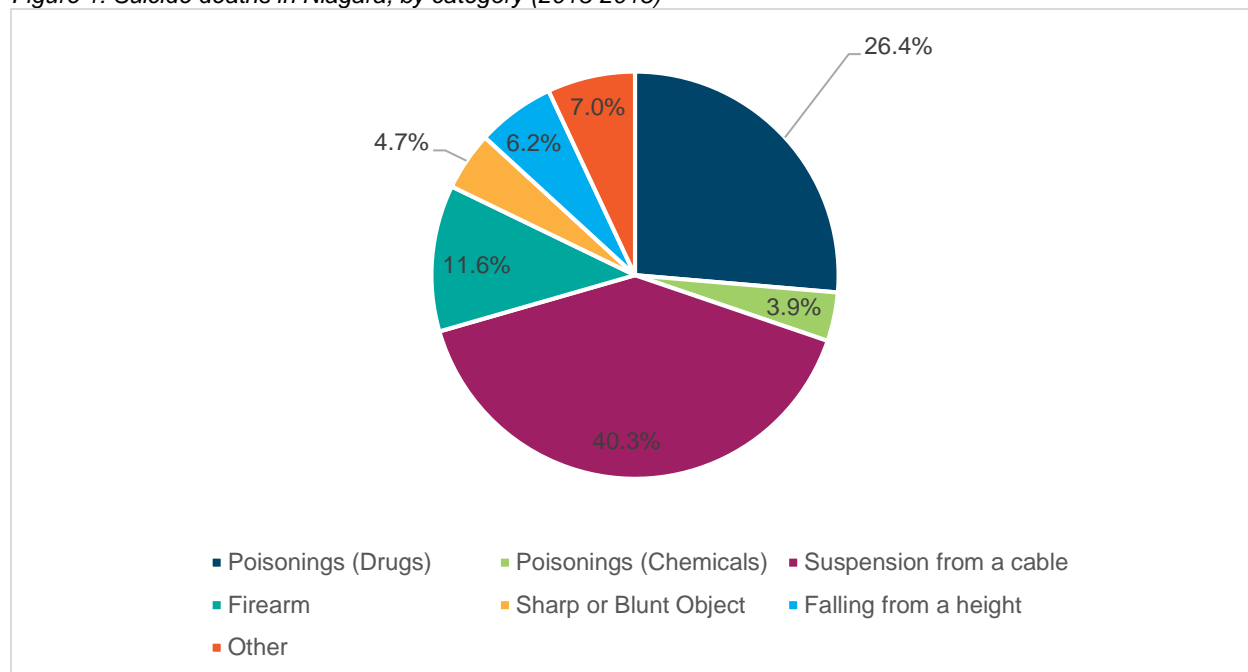
When someone dies, the attending physician or the coroner (depending on the type of death) will complete the death certificate. The information on the death certificate is compiled by Statistics Canada into the Vital Statistics dataset, however, there is significant lag to this process. Current data is available up to 2015.

According to this data, between 2013 and 2015, there were 129 deaths by suicide in Niagara. Of these, the most common methods of suicide were suspension from a cable (40.3%) and poisoning by drugs (26.4%).

¹ Public Health Agency of Canada (2015). *Suicide in Canada*. Retrieved from: <https://infobase.phac-aspc.gc.ca/datalab/doc/SuicidePrevention-Infographic-en.pdf>

² PHD-C 01-2019 Number of Persons Impacted by a Death by Suicide

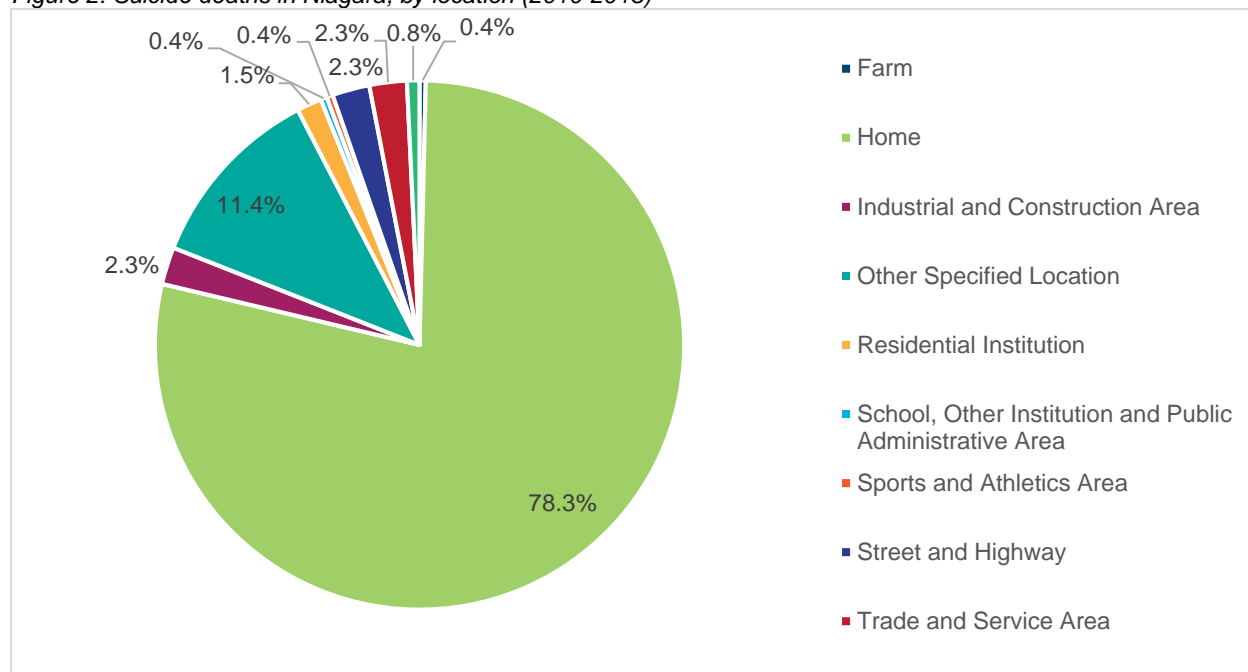
Figure 1: Suicide deaths in Niagara, by category (2013-2015)



Data Source: Vital Statistics, 2013-2015.

Approximately 78% of suicides in Niagara occur in the home (Figure 2. Excluding other private property (e.g. farms, industrial properties), at most, 14.8% of deaths occurred in public places.

Figure 2: Suicide deaths in Niagara, by location (2010-2015)



Data Source: Vital Statistics, 2010-2015.

Challenges exist in obtaining timely data due in part to the workload of the coroner, the reality that the coroner's files are for investigative purposes and not designed for easy and reliable data extraction, and the time needed to investigate a death. In discussion with the Regional Coroner, given that we do not have access to accurate, timely, local data, we plan to ask for data updates on an annual basis. This will balance our need to follow the data with the intensity of the work that the coroner's office must conduct in order to pull more recent or specific data for us, as was done for *PHD 03-2019 Preventing Deaths by Suicide on Public Infrastructure*.

Framework to Prevent Suicide

We reviewed industry-specific, regional, national, and international frameworks, and found both that broad suicide prevention is very complex, and that in general, frameworks suggest a focus on prevention, intervention and postvention.

Put very simply, prevention is a group of activities such as increasing awareness, eliminating stigma, knowing what to do in the event that you or someone you know experiences thoughts or behaviours associated with suicide. Intervention is helping someone who is having thoughts of suicide. Postvention is helping someone heal after the experience of suicide thoughts, attempts or death; this is important as these individuals are at greater risk for suicide. Many activities cross two or more of these three broad areas.

After extensive review, we present a framework to prevent suicide. This framework is broader than the one presented in *PHD 03-2019* which focused on public infrastructure only. The framework here incorporates prevention, intervention and postvention. Several of the activities are underway and ongoing, while others (highlighted) are recommended for immediate undertaking.

Table 2. Framework to Prevent Suicide in Niagara

Area of Suicide Prevention: Public Awareness		
Activity	Examples	Roles and Responsibility
Media reporting guidelines	Engagement with media on reporting of deaths by suicide.	ONGOING This is a focus of NSPC and was addressed by Council in one of the recommendations in <i>PHD 03-2019</i> . Several productive discussions have occurred with Niagara's media around current Canadian media guidelines for suicide reporting.
Awareness raising	Raise awareness about suicide and suicide-prevention strategies.	ONGOING Local mental health and addictions service providers support anti-stigma and awareness events and campaigns (e.g. Distress Centre Niagara hosts an annual Suicide Awareness Walk). NRPH & ES will consult with NSPC around supporting the launch of a larger campaign with a goal of reducing stigma around mental health.
Area of Suicide Prevention: Restricting & Deterring Means		
Activity	Examples	Roles and Responsibility
Barriers on public infrastructure	Barrier at locations with frequent deaths by suicide	ONGOING Council has approved and budgeted for one barrier at a

		location with several recent deaths.
Gun control	In 1977, Canada restricted firearms. This decreased overall suicide rates and suicide by firearm rates ³	Federal jurisdiction. There is little additional that can be done locally on this.
Reduced access to pharmaceuticals	Prescribing practices may have an impact, this area needs more study.	Federal and provincial jurisdiction regulate approval, access, and procurement of most pharmaceuticals. The health care sector is actively addressing opioid prescribing.
Other means restrictions	Examples from other jurisdictions include use of catalytic converters in motor vehicles, prison regulations to reduce death by hanging, and regulation of pesticides.	Hanging is the most common mean of suicide in Niagara, unfortunately it is not practical nor likely possible to restrict this mean.
Individual means restriction as follow-up to suicide risk assessment	Asking clients about means, and planning to restrict those means.	ONGOING NRPH & ES is working on implementing a suicide risk assessment strategy with partners across the mental health, addictions, and primary care sectors.
Area of Suicide Prevention: Increasing Opportunities for Help Seeking		
Activity	Examples	Roles and Responsibility
Signs & phones	There is some evidence that signs and phones have a helpful impact. Signs have been installed at the recent infrastructure of interest and phones are being explored	ONGOING Public Works is lead for this.

³ Sarchiapone, M., Mandelli, L., Iosue, M., Andrisano, C., & Roy, A. (2011). Controlling access to suicide means. *International journal of environmental research and public health*, 8(12), 4550-62.

Crisis lines	Distress Centre is available 24/7 and Crisis Outreach and Support Team (COAST) provides supports (not a rapid response service)	IN PLACE These agencies are members of NSPC
Walk in crisis counselling	Canadian Mental Health Association and Pathstone Mental Health have walk-in counselling services	IN PLACE These agencies are members of NSPC
School-based programs	Mental health is a priority area for schools in Ontario and much is being done to address student needs. More high quality studies are needed to know the best interventions in schools.	ONGOING DSBN and NCDSB mental health leads are part of the NSPC.
Staffed sanctuary	HUB or Clubhouse model in St. Catharines. This is a desire of the community.	NRPH & ES could offer to complete a situational assessment around the option of a HUB or Clubhouse model if additional capacity is created. The Oak Centre operates a Clubhouse in Welland.
Area of Suicide Prevention: Increasing Probability of Intervention		
Activity	Examples	Roles and Responsibility
Surveillance cameras	NRPS surveillance pilot at locations where suicide may occur.	ONGOING NRPS is leading this work
Police patrols	Increase police patrols in locations where suicide may occur	IN PLACE NRPS is the lead for this
Suicide awareness & intervention training	ASIST & safeTALK training to prepare the community to identify and intervene with those who may be having thoughts of suicide.	NRPH & ES in partnership with NSPC can expand trainings to be offered in the community. We could facilitate more certified trainers to sustain impact of training over time.

Area of Suicide Prevention: Enhancing Capacity of the Mental Health System		
Activity	Examples	Roles and Responsibility
Treatment of mental illness	Treatment such as cognitive behavioural therapies and/or pharmaceutical interventions for those with a mental illness	ONGOING NRPH & ES and community partners are engaged in working with individuals with mental health and addictions issues.
Increasing suicide risk assessment	Build capacity among health care providers for using a common risk assessment	NRPH & ES will facilitate a community forum with a subject matter expert on suicide risk assessment for health service and primary care providers.
Mental health service coordination	Integration and coordination of mental health and addictions services to provide seamless care	ONGOING NRPH & ES to support the Mental Health and Addictions (MHA) Project Manager over the next two years. This LHIN-funded position will be responsible for advancing the development of an integrated and coordinated mental health and addictions system in Niagara.

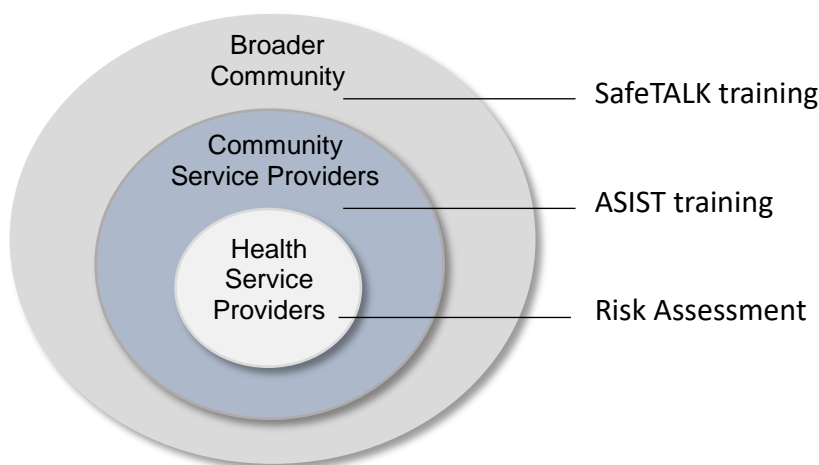
After reflecting on current activities and completing a gap analysis, several initiatives are recommended for implementation. To have a greater impact on suicide, we need to enable a more extensive community response. We are recommending that NRPH & ES support the NSPC to increase the availability of training and the number of qualified trainers for suicide awareness and intervention. We are also recommending that NRPH & ES facilitate capacity building among health care providers for suicide risk assessment, starting with a community forum facilitated by a subject matter expert. This identified work, taken together, will require the addition of a Health Promoter and a Training Specialist to current staff complement working on suicide prevention. This work will be done in partnership with the NSPC.

NSPC is an unfunded community group that was formed in 2003 in response to a cluster of deaths by suicide by identical means in the Niagara region attributed to intense suicide contagion. NSPC members include dozens of organizations, service providers and community-minded individuals from across Niagara that work together to

make Niagara a suicide-safer community. See Appendix A for a list of member organizations.

Proposed Next Steps

If this proposal is approved, NRPH & ES, in collaboration with the NSPC, will facilitate various training and capacity building opportunities, including “train the trainer” sessions to enhance sustainability beyond the two years. Also if approved, the Health Promoter and the Training Specialist will also offer to conduct a situational assessment of the potential for a HUB or clubhouse in St. Catharines.



SafeTALK and ASIST are trainings that can make a community suicide safer by training individuals in a community who have face-to-face contact with other community members as part of their usual routine.

SafeTALK workshops are effective in teaching the practical skills necessary for actively evaluating and responding to individuals having thoughts of suicide. ASIST is an internationally recognized training for helping people gain the skills to recognize someone at risk of suicide, and to know how to intervene to support a person with thoughts of suicide.

A Suicide Risk Assessment Strategy has been developed by NRPH & ES's Mental Health program and is currently being implemented across all Mental Health's services. The Strategy has potential to be expanded across the professional community among health service and primary care providers. The goal is to build capacity for use of a common suicide risk assessment by all providers. Efforts will begin with a community forum facilitated by a subject matter expert on suicide risk assessment for health service and primary care providers.

The following is a sampling of the different groups targeted by the various training and capacity building strategies proposed:

Table 3. Priority Groups for Training/Capacity Building

	SafeTALK	ASIST	Suicide Risk Assessment
Public Works employees across municipalities	X		
Older adults	X		
People who work with the older adult population	X	X	
Family members of older adults	X		
Family members of clients accessing mental health services	X		
Media with additional support around best practice guidelines for safe reporting around suicide	X		
Health care providers across Niagara	X	X	X
Staff in the shelter system	X	X	
Adults that work with youth	X	X	
Primary care providers			X

Alternatives Reviewed

Staff recommend a comprehensive approach to suicide prevention, and commensurate funding to enable that work.

The alternative, taking a single-pronged approach of means restriction at only one location, will end the very significant spike in deaths by suicide at that location (equivalent to 28% of deaths by suicide expected for October 2018 to March 2019), but not address the broader burden of deaths by suicide across Niagara. As well, a comprehensive approach is necessary to address the complex, multi-factorial causes of death by suicide.

If additional work to combat suicide is not funded, efforts will continue by both NRPH & ES and NSPC to address this issue with less potential. This status quo level of effort can be expected to yield the status quo outcomes, with minimal reduction in deaths by suicide community-wide.

Other Pertinent Reports

[PHD 03-2019 – Preventing Deaths by Suicide on Public Infrastructure](#)
[PHD 05-2019 – 2019 Public Health Annual Service Plan and Budget Submission](#)

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Submitted by:

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Appendices

Appendix 1 Niagara Suicide Prevention Coalition Membership

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Appendix 1

Niagara Suicide Prevention Coalition Membership

Our Mandate

Niagara Suicide Prevention Coalition exists to bring interested community organizations, groups, individuals and volunteers together to make Niagara a suicide-safer community.

Members include

- Contact Niagara
- Canadian Mental Health Association
- Distress Centre Niagara
- Niagara Health
- Community Addiction Services of Niagara
- John Howard Society
- Family and Children Services of Niagara
- Kristen French Child Advocacy Centre of Niagara
- District School Board of Niagara
- Niagara Catholic District School Board
- Niagara College
- Brock University
- Bridges Community Health Centre
- Centre de Santé Communautaire Hamilton/Niagara
- Ontario Centre of Excellence for Child and Youth Mental Health Justice Niagara
- Bethany Community Church
- Wellness Opportunities
- Niagara Region Public Health

Subject: Actions to Inform Procurement Process of EarlyON Child and Family Centres

Report to: Public Health and Social Services Committee

Report date: Tuesday, April 16, 2019

Recommendations

1. That all current service provider agencies (Appendix A) continue to operate EarlyON Child and Family Centres until the conclusion of the procurement process, and that Staff **BE AUTHORIZED** to negotiate any and all required amendments and documentation related to existing agreements for current service provider agencies;
2. That the Negotiated Request for Proposal (NRFP) process **BE INITIATED** in Q2 2019 and that Staff **BE AUTHORIZED** to enter into negotiations with the selected proponents based on the NRFP process, subject to confirmation of provincial funding;
3. That the evaluation scoring matrix (Appendix B), to be used to score NRFP submissions from potential service providers, **BE APPROVED**;
4. That Staff **BE AUTHORIZED** to negotiate with Bethlehem Housing and Support Services as the sole sourced EarlyON service provider to operate an EarlyON Child and Family Centre specifically for high needs families in Niagara;
5. That Staff **BE AUTHORIZED** to negotiate with Fort Erie Native Friendship Centre as the sole sourced EarlyON service provider to operate a culturally relevant, Indigenous-led EarlyON Child and Family Centre in Niagara;
6. That Staff **BE AUTHORIZED** to negotiate with Centre de santé communautaire Hamilton/Welland as the sole sourced EarlyON service provider to operate a French-language EarlyON Child and Family Centre in Niagara;
7. That Staff **BE AUTHORIZED** to negotiate with Sault Ste Marie Innovation Centre to license the use of KEyON data collection software in all EarlyON Child and Family Centres across Niagara; and
8. That the Commissioner of Community Services, or their designate, **BE AUTHORIZED** and directed to execute any and all documents required to implement sections 1, 2, 4, 5, 6 and 7 of the Recommendations.

Key Facts

- The purpose of this report is to seek Regional Council's approval of a number of recommendations pertaining to the formal procurement for the EarlyON Child and Family Centre service system.
- As of January 1 2018, the provincial government added the EarlyON Child and Family Centre service system planning and administration to Niagara Region, as the Consolidated Municipal Services Manager (CMSM).
- Now in addition to its existing responsibility of service system management of the local early learning and licensed child care system, Niagara Region's Children's Services has the additional responsibility of service system management of all EarlyON Child and Family Centres across Niagara.
- Children's Services will be issuing a Negotiated Request for Proposal with the goal to seek preferred proponents who will be invited to enter into direct contract negotiations with Children's Services in order to operate an EarlyON Child and Family Centre in one or more service zones across Niagara, and to participate in the transformation to a new integrated early years system.
- In order to support and provide consistent and accessible core services throughout Niagara, 16 service zones have been identified (Appendix C). Service zones have been developed based on detailed analysis of population data, density and distribution of children ages 0-4 years, areas identified for population growth for young families, and feedback from parents/caregivers, service providers, and community service agencies.
- Throughout 2018 information was gathered through ongoing planning activities and community engagement to inform the NRFP framework and procurement process, evaluation scoring matrix, and other service system components outlined within the report, for consideration and approval by Regional Council.

Financial Considerations

Of the \$4.09 million EarlyON service system funding allocation from the Ministry of Education (MEDU), \$2.7 million is directed for operation of EarlyON Child and Family Centres. The remaining \$1.3 million is provincially mandated to support a number of services:

- Professional resource centre to support professional learning and development of staff,
- Early Literacy Specialist to support early literacy and numeracy by providing resources, workshops, and consultations for parents/caregivers and staff,
- Data analysis services to inform service system planning, and
- Planning activities by the local, provincially mandated Best Start Network.

As well, the \$1.3 million includes funding allocated to the three specialized service providers, (recommended to be sole-sourced), and the KEyON data collection software

to be used in all EarlyON Child and Family Centres across Niagara (also recommended to be single-sourced), in compliance with Niagara Region's Procurement By-law and as outlined in this report.

This funding allocation, received in January 2018, reflects a net increase of approximately \$120,000 (included within the \$1.3 million noted above) over previous years provincial amounts. The additional funding, consistent with provincial expectations, was used to increase service for Indigenous, French language, and high risk families, identified as provincial priorities. These are 100% MEDU funding dollars with no expectation for municipal cost share contributions.

Analysis

Effective January 1 2018, Niagara Region Children's Services became responsible for planning and administration of EarlyON Child and Family Centres, in addition to its responsibility for local licensed child care system and other human services, on behalf of the province. Children's Services has been charged to locally implement the provincial vision of an integrated and coordinated early years system, with seamless transitions between programs and services that support early learning and healthy child development.

At the initiation of this new responsibility, as a short-term strategy, Niagara Region entered into service agreements with existing service providers to allow for a period of local planning, analysis and review of provincial policy. As a next step towards implementing the provincial vision, Children's Services will be issuing a Negotiated Request for Proposal (NRFP). The NRFP process will support the transition and transformation of the existing EarlyON service system as per MEDU expectations within provincial budget allocations. The NRFP will identify preferred proponents who will enter into contract negotiations to operate an EarlyON Child and Family Centre in one or more of the 16 service zones. Proponents will also be expected to participate in the transformation to a new integrated early years system.

The sixteen service zones have been developed based on detailed analysis of population data, density, and distribution of children ages 0-4 years, areas identified by Niagara Region's Planning Department for population growth for young families, and feedback from parents/caregivers, service providers, and community service agencies. Children's Services goal is to have a minimum of one EarlyON Centre operating within each service zone; however, this is contingent on annual provincial funding and the proposals received by the proponents to the NRFP procurement.

Throughout 2018, ongoing planning (through an EarlyON Advisory Committee), data collection, and community engagement with key stakeholders (children and their parents/caregivers, service providers, and staff) was used to inform the NRFP framework and process. Surveys and facilitated sessions were used to:

- Help develop service zones to meet the planning goal that each resident have equitable access to EarlyON Centres across Niagara,
- Locally define core services available across all EarlyON Centres in Niagara,
- Better understand service delivery needs of smaller and/or rural communities.

More information was subsequently collected from five (5) focus group sessions in rural and/or smaller communities and a pilot project. Results are consistent with findings from the local needs assessment completed in 2017. Staff continue to hear that families who attend EarlyON Child and Family Centres place a high value on the free programs and services and support they receive from staff. Parents/caregivers also noted their desire to:

- Have more flexible hours (open over lunch hour, evenings, weekends, and over summer months and other school closure times),
- Have more opportunities for outdoor play, and
- Have increased awareness of the Centre and programs and services offered.

A pilot project, established to support system transformation, started in April 2018, allowed for testing of stakeholder recommendations and key service delivery components, such as co-location with existing community services, flexible service hours and multiple aspects of accessibility and inclusion (e.g. universally accessible space, free and ample parking, within a 15 minute drive from home, increased access for Indigenous, French language services and services for high needs families).

To further support the formal procurement process, a Review Panel was struck, with members selected based on criteria, such as:

- Knowledge of the early years sector,
- Having no conflict of interest, real or perceived,
- Professional qualifications,
- Years of experience within the human services/children's services industry, and
- Local area knowledge.

The Review Panel role is two-fold. First, to provide advice and feedback to inform development of the NRFP framework, by reviewing information gathered from the aforementioned planning, data collection and community engagement activities in 2018. The Review Panel provided advice and feedback on components such as service zone selection, staffing ratios, evaluation scoring criteria and matrix to assess submissions, and submission eligibility requirements. Once NRFP submissions are received, the role of the Review Panel will shift, and members will review and score written submissions and presentations.

As was the intention when Children's Services was granted approval to temporarily defer the formal procurement process for a period of one year (COM 21-2017), this time allowed staff to gain experience and knowledge of systems management

responsibilities of the EarlyON Child and Family Centres. Information gathered through planning and engagement in 2018 has informed the NRFP framework and procurement process, evaluation scoring matrix, and other service system components outlined below.

Procurement approach and evaluation scoring matrix

The NRFP shall request proposals per identified service zone. Proponents will be required to complete a written submission for each service zone of interest. After the NRFP closing date, Niagara Region's Strategic Sourcing division will review all submissions to determine eligibility based on established mandatory criteria. All eligible written submissions will be distributed to Review Panel members for review and scoring.

Written submissions will be scored, out of a possible 80 points based on:

- Organizational and Administrative Capacity and System Readiness (32 points)
- High Quality Accessible Service Delivery (24 points)
- Family Relationships and Partnerships (16 points)
- Innovation (8 points).

See Appendix B for further details on the above.

All proponents will be invited to present to the Review Panel, as the second phase of the evaluation process. Proponents will receive a question/scenario to inform their presentation, to consist of 20 points of the overall score.

The preferred proponent for each service zone will be based on the highest score, and will be invited to enter into contract negotiations with Niagara Region to operate an EarlyON Child and Family Centre for that particular service zone, and participate in the transformation to a new integrated system.

Should those contract negotiations fail, Niagara Region will enter into a new round of contract negotiations with the proponent having the second highest score for the specific service zone. While the goal is to have a minimum of one EarlyON Centre operating within each service zone, this is contingent on annual provincial funding. Children's Services will not exceed the funding allocation of \$2.7 million, therefore any changes to the funding allocation will impact contract negotiations, and require changes to the service zone goal.

Pending Committee and Council approval of this report, following is the proposed NRFP schedule:

Steps	Timelines
Council Approval	April 2019
NRFP Information Session (for interested proponents)	April 2019
NRFP Issuance	May 2019
NRFP Close	June 2019
Evaluation of NRFP (including Presentations)	June - July 2019
Announcement of Preferred Proponents	August 2019
Negotiations	Until complete (anticipated by the end of Q4 2019)

Subject to provincial funding, and following negotiations, Children's Services will enter into purchase of service agreements with preferred proponents on a phased in basis in order to ensure continuity of services across Niagara.

Term of service agreements with successful EarlyON proponents

Children's Services Staff are recommending the term for the successful proponents remain in effect for one year and automatically renew for further terms of one year on each service agreement anniversary date.

This allows for long-term service system planning, and is consistent with current practice within the Children's Services Division for service agreements with licensed child care service providers and agencies delivering special needs services. As is the case with licensed child care and special needs services, Children's Services will monitor to ensure EarlyON programs and services are provided in accordance with the service agreement. Should the EarlyON service provider fail to perform these programs and services, Niagara Region may terminate the service agreement in accordance with the terms and conditions of the agreement.

Approval for entry into a sole source agreement with Bethlehem Housing and Support Services as high needs family service provider:

Children's Services staff recommends that Bethlehem Housing and Support Services be exempt from the NRFP process, and that Niagara Region be allowed to amend its existing service agreement with Bethlehem Housing and Support Services to continue operation of an EarlyON Child and Family Centre for high needs families in Niagara.

Since 1996, Bethlehem Housing and Support Services has operated a child and family program within a building that provides one year transitional housing to children and their families who are homeless due to issues with poverty, physical disability, mental health, domestic violence and family breakdown. Co-location has ensured accessibility and intensive supports available for high needs families, to improve child and family outcomes.

In January 2018 these child and family programs were integrated within the local EarlyON system, as part of a cohesive system of services and supports for children ages 0-6 years and their families/caregivers.

While the funding provided to Bethlehem Housing and Support Services is part of the overall \$4.09 million allocation, it is not included in the \$2.7 million allocated as part of the NRFP for the operation of EarlyON Child and Family Centres.

Approval for sole source agreement with Fort Erie Native Friendship Centre as Indigenous EarlyON service provider:

Children's Services staff recommends that Fort Erie Native Friendship Centre be exempt from the NRFP process, and that Niagara Region be allowed to amend its existing service agreement with Fort Erie Native Friendship Centre to continue operation of an Indigenous led EarlyON Child and Family Centre in Niagara.

Niagara Region is required, by the MEDU, to offer programs and services that reflect local Indigenous cultures, and are expected to work in close partnership with Indigenous organizations to plan for and deliver culturally relevant early years programs and services off-reserve.

Since 1996 Fort Erie Native Friendship Centre has been operating culturally relevant, Indigenous-led early years programs and services off-reserve, including licensed child care and a child and family program. In January 2018, the child and family program was integrated within the EarlyON system

While the funding provided to Fort Erie Native Friendship Centre is part of the overall \$4.09 million allocation, it is not included in the \$2.7 million allocated as part of the NRFP for the operation of EarlyON Child and Family Centres.

Approval for sole source agreement with Centre de santé communautaire Hamilton/Welland as French language EarlyON service provider:

Children's Services staff recommends that Centre de santé communautaire Hamilton/Welland be exempt from the NRFP process, and that Niagara Region be allowed to amend its existing service agreement to continue operation of a French language EarlyON Child and Family Centre in Niagara.

Niagara Region is required to provide French language child and family programs and services in accordance with its legislated responsibilities under the *French Language Services Act*. Currently the municipalities of Welland and Port Colborne are designated communities.

Centre de santé communautaire Hamilton/Welland is a multi-service agency providing health and social services to French-speaking clients and serves the entire Niagara region. Since 1996, Centre de santé communautaire Hamilton/Welland has been operating a French language child and family program. In January 2018, this was integrated within the EarlyON system.

While the funding provided to Centre de santé communautaire Hamilton/Welland is part of the overall \$4.09 million allocation, it is not included in the \$2.7 million allocated as part of the NRFP for the operation of EarlyON Child and Family Centres.

Approval for Sault Ste Marie Innovation Centre as single source vendor, for licensing agreement for KEyON software to be used at all Niagara EarlyON Child and Family Centres

Accurate and quality data is required for MEDU quarterly reporting requirements, local measurement of participation and critical for ongoing local system planning. The current system used by many EarlyON Centres is aging and no longer supported, while other locations rely on manual data tracking. As well, the MEDU has noted no additional investments will be made at the provincial level for data collection software. Therefore, Children's Services staff sought to find data collection software that would:

- Collect the MEDU required data variables,
- Be subject to ongoing system improvement and updates,
- Allow for central collection of participant data across Niagara,
- Be in use by other municipalities, and
- Be user friendly for both parents/caregivers and staff.

Since September 2018, the KEyON data collection software, created by the Sault Ste. Marie Innovation Centre, has been in use at the EarlyON pilot site at Seaway Mall in Welland. This software was created specifically to collect MEDU data variables, is used by eight other Ontario municipalities, is being piloted by two municipalities, and meets all other aforementioned criteria.

Based on positive results of the software pilot, Children's Services staff recommend purchasing a license and related service maintenance for the KEyON data collection software. The license purchase cost is approximately \$13,000 annually. The software would improve data quality to support reporting to the MEDU, as well as support informed decision making and local ongoing system planning.

Alternatives Reviewed

Not issue a formal procurement and work with existing providers and negotiate single source service agreements to provide EarlyON services

Children's Services staff have reviewed the alternative and are not recommending it due to the challenges noted below:

- A formal procurement process will ensure openness, accountability and transparency with current service providers and any possible new service providers are given equal opportunity to make a submission
- A formal procurement process will ensure preferred proponents, who enter into contract negotiations with Children's Services, are fully aware of service system expectations, and willingly participate in the transformation to a new integrated early years system.
- A formal procurement process will allow Children's Services to build on existing strengths of the current EarlyON system, and also capitalize on opportunities that occur through system transformation (e.g. eliminate duplication of services, more equitable access across Niagara, consistency of program delivery).

Relationship to Council Strategic Priorities

The provision of accessible and quality early learning programs and services supports Council's focus on Economic Prosperity.

Other Pertinent Reports

- COM 9-2016 Ontario Early Years Child and Family Centres
- COM 21-2017 Ontario Early Years Child and Family Centres
- COM 23-2017 Ontario Early Years Child and Family Centre Plan
- CWCD 289-2018 Pilot EarlyON Child and Family Centre at Seaway Mall in Welland

Relationship to Council Strategic Priorities

The provision of accessible and quality early learning programs and services supports Council's focus on Economic Prosperity.

Other Pertinent Reports

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- COM 21-2017 Ontario Early Years Child and Family Centres
- COM 23-2017 Ontario Early Years Child and Family Centre Plan
- CWCD 289-2018 Pilot EarlyON Child and Family Centre at Seaway Mall in Welland

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Appendices

Appendix A – List of current EarlyON Child and Family Centre service provider agencies

Appendix B – Proposed Evaluation Scoring Matrix

Appendix C – Map of Service Zones

Appendix A – List of current EarlyON Child and Family Centre service provider agencies

Name of Agency	Operating EarlyON Centre(s) in the following municipalities:
Bethlehem Housing and Support Services	St. Catharines
Centre de santé communautaire Hamilton/Niagara	Welland
District School Board of Niagara	Fort Erie, Niagara Falls, St. Catharines, Welland
Family and Children Services Niagara	Pelham, Welland
Fort Erie Native Friendship Centre	Fort Erie
Niagara Catholic District School Board	Niagara Falls, Niagara-on-the-Lake
Port Cares	Fort Erie, Lincoln, Port Colborne, Welland, West Lincoln
Strive Niagara	Grimsby
YMCA of Niagara	St. Catharines, Thorold

Appendix B – Proposed Evaluation Scoring Matrix

Item	Evaluation Components	Points Total 100
<i>Demonstrate Organizational and Administrative Capacity and System Readiness</i>	<ol style="list-style-type: none"> 1. The organization has experience in directly delivering early years programs and services and working with community partners. 2. The delivery of EarlyON Child and Family Centre(s) is aligned with organization's mandate, services and structure. 3. Organization supports the Provincial strategy of one common brand to achieve greater coherence across the EarlyON Child and Family system. 4. The organization has a realistic readiness and transition plan, including engagement and communications to minimize disruption during start up and transition; clearly identify challenges and appropriate mitigation strategies. 5. Human resource plan for the recruitment and retention of Registered Early Childhood Educators (RECEs) and other staff supports: <ol style="list-style-type: none"> a. Qualified staff teams, consisting of a minimum of 1 RECE, to deliver mandatory core services related to supporting early learning and development b. Staff engage in professional learning opportunities to ensure they remain aware of current practice and new research on child development 6. Administrative and financial capacity to operate and sustain EarlyON Child and Family Centre(s): <ol style="list-style-type: none"> a. Proposed budget that is aligned with the EarlyON Child and Family Centre objectives and supports equity across the system: <ul style="list-style-type: none"> ▪ Administration costs do not exceed 10% of total budget 	32

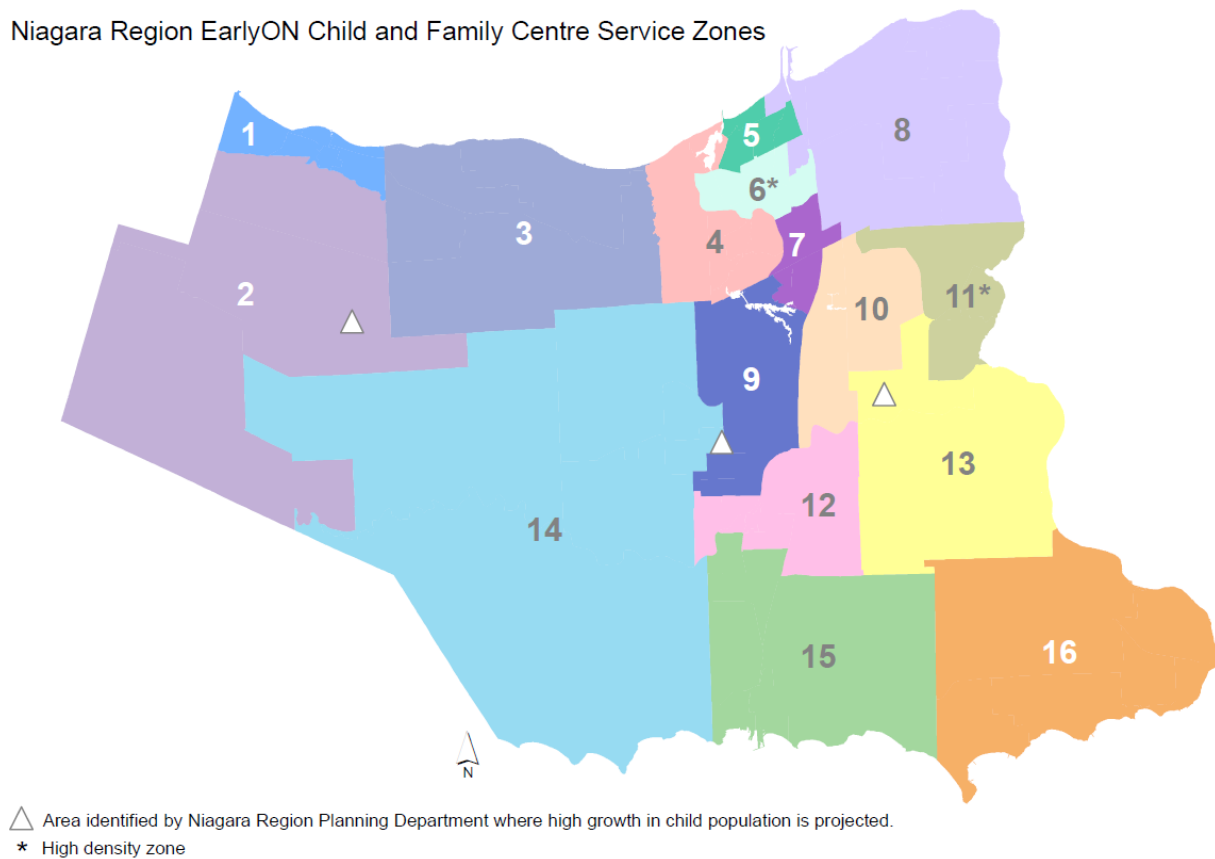
Item	Evaluation Components	Points Total 100
	<ul style="list-style-type: none"> ▪ An established, fair and equitable remuneration plan for staff ▪ The organization shows a healthy financial position 	
<i>Demonstrate High Quality Accessible Service Delivery</i>	<ol style="list-style-type: none"> 1. Clearly demonstrates understanding of population needs and community assets within the service zone: <ol style="list-style-type: none"> a. Proposal is informed by research/evidence (e.g. community or program data, key community planning/research documents, statistics or community trends, regional/local planning documents, etc.) 2. Submission includes sound schedule, staffing and costing for the proposed service zone. 3. Offers inclusive barrier free environment where programs and services are designed and delivered in a way that is responsive to diverse populations in alignment with local needs (i.e. diverse cultures and languages, children of varying abilities, various family structures, Francophone and Indigenous families, and newcomers to Niagara). 4. Service delivery is evidence informed, offers no fee programs and services for all children aged 0-6 years and their parents/caregivers that contribute to healthy child development and align with the expectations outlined in the EarlyON Child and Family Centres Planning Guidelines for Service System Managers. 5. Service delivery includes mandatory core service requirements as defined in the Ontario Early Years Child and Family Centres Business Practices and Funding 	24

Item	Evaluation Components	Points Total 100
	<p>Guidelines for Service System Managers such as:</p> <ul style="list-style-type: none"> a. engaging parents and caregivers, b. supporting early learning and development c. making connections for families <p>6. Expertise in the delivery of programs and services in alignment with the pedagogical approach described in the Ministry of Education How Does Learning Happen? Ontario's Pedagogy for the Early Years.</p>	
<p><i>Demonstrate Ability to Establish Family Relationships and Partnerships to Create Customized Community Connections</i></p>	<ul style="list-style-type: none"> 1. Commitment to working collaboratively and effectively with organizations (public, non-profit or private) to complement core services and offer additional programs and services at the EarlyON Centre that align with the unique needs and priorities of individual communities. 2. Making connections for families through established linkages to other agencies or programs that would support further integration, facilitate smooth transitions and referrals, within a broader system context of local community services (e.g. public libraries, child care, public health, employment and training programs). 3. Engaging communities, educators, parents and caregivers in designing EarlyON and Family Centre programs and services that embrace and build on strengths, address identified gaps and meet unique needs. 	16
<p><i>Demonstrate Innovation and Continuous Improvement</i></p> <p><i>Definition of Innovation-Innovative approaches</i></p>	<ul style="list-style-type: none"> 1. Organization demonstrates how the proposal supports an innovative approach; this results in clear impact to the target population, service delivery and/or organizational efficiency; innovative approach can be implemented. 	8

Item	Evaluation Components	Points Total 100
<i>can include: a new and/or improved way of delivering a service; initiatives that will result in greater efficiency within organizations; and/or that identify and respond to new and emerging needs.</i>	<ol style="list-style-type: none"> 2. Delivery of early years programs and services that are responsive and flexible and include strategies to support local assets/needs and/or circumstances. 3. Leveraging opportunities to provide multiple community services through fewer service delivery mechanisms/locations to ensure that children, parents/caregivers have easy and efficient access to services they need (reference to Community Hubs in Ontario: A Strategic Framework Action Plan). 4. The organization offers additional value added resources that demonstrate enhancement above and beyond mandatory core services, such as, but not limited to: <ol style="list-style-type: none"> a. community resources (e.g. toy lending library, employment services), to support unique needs of parents/caregivers b. specialized staffing and/or services to support unique needs of parents/caregivers c. Measure and report on key indicators aligned with measuring outcomes to assess progress; adherence to terms and conditions of funding, reporting, monitoring and tracking of participants. 	
<i>Presentation</i>	Scenario with evaluation components will be provided to proponent during scheduling of presentations.	20

Appendix C – Map of Service Zones

Niagara Region EarlyON Child and Family Centre Service Zones



Data source: Statistics Canada 2016 Census, Single Year Age Profile

Subject: Emergency Shelter Funding Adjustments

Report to: Public Health and Social Services Committee

Report date: Tuesday, April 16, 2019

Recommendations

1. That the \$1,144,861 increase in emergency shelter homelessness contracts, from \$6,938,250 (initially approved in COM 16-2017) to \$8,083,111 for the (33 month) period July 1, 2017 to March 31, 2020 **BE APPROVED**;
2. That staff **BE AUTHORIZED** to execute any required amendments and documentation related to existing agreements for current service providers of emergency shelter to implement the increases in funding.

Key Facts

- Council is receiving this report because a funding adjustment to a previously approved amount is required in accordance with the Region's Purchasing By-law. Homelessness contracts for emergency shelter services were awarded in May 2017 to nine service providers, totalling \$6,938,250 for the period July 1, 2017 to March 31, 2020.
- Niagara Region funds and works collaboratively with 22 agencies in the region to deliver homelessness services to residents of Niagara, including emergency shelter service.
- Emergency shelter services include overnight accommodation, meals, hygiene items, and other supports including assisting clients to find stable and adequate housing.
- The past year (2018) saw increased costs in emergency shelter services where an increase to the number of shelter beds was necessary to meet rising demand for services, especially seasonally in fall/winter including a pilot "Out of the Cold" program in Niagara Falls, and where agencies deliver services through motel rooms. The requested adjustment in funding will cover these increased costs of system expansion and provide an additional contingency of \$200,000 should funding adjustments be necessary.

Financial Considerations

The increased emergency shelter contract costs were incorporated in the 2019 approved operating budget. These increased costs were accommodated through provincial funding increases, as well as under expenditures in other homelessness services areas (e.g. Housing Stability Plan, Niagara Emergency Energy Fund).

Homelessness services including shelters are largely funded by the Ministry of Municipal Affairs and Housing (anticipated to be \$7.5M for 2019-2020).

Analysis

Community Services operationalizes the Region's responsibilities as the Consolidated Municipal Services Manager (CMSM) for the homelessness system in Niagara. Its key responsibility is service system planning and administration for the homelessness system, and it operates under rules established by the Ministry of Municipal Affairs and Housing.

The Homelessness Services division contracts with community agencies to provide emergency shelter services to individuals and families who are homeless. Most are also Housing First providers, aligning shelter services with rapid rehousing and support services consistent with best practice. In addition, shelters provide connections to other services as required including mental health supports, addictions supports, and counselling.

The overall number of shelter beds funded through this adjustment has increased by 50 since the initial contract awards and 30 beds included in the increase are seasonal in nature. Niagara, like most jurisdictions in Ontario has seen increased pressure in shelter operations. Niagara has seen a slight increase in the number of households presenting at shelters as well as an increase in the length of stay in shelters. This combination resulted in a shelter occupancy rate of 108% in 2017. Through system enhancements in 2017/2018, the occupancy rate has come down slightly to 104%.

To support system pressures, Niagara leverages motel rooms when additional capacity is required. The Social Assistance and Employment Opportunities division manages these during business hours, and after hours, a lead shelter agency ensures residents have a place to stay through motelling until a shelter bed becomes available.

Occupancy rates are calculated inclusive of the use of overflow motel rooms. Community Services will continue to monitor the occupancy rate of shelters and use of motelling and make system adjustments to ensure client service needs are addressed as well as prudent use of provincial and levy funding.

The contracts for shelter and homelessness services expire March 31, 2020. The division will be commencing a new procurement process in fall of 2019 with contracts being effective April 2020.

Alternatives Reviewed

Not applicable.

Relationship to Council Strategic Priorities

Not applicable (pending the development of Council's new Strategic Priorities).

Other Pertinent Reports

- COM 16-2017 Emergency Shelter Expression of Interest (EOI) Award Results
- COM 01-2019 Community Homelessness Prevention Initiative Investment Plan 2019-20

Prepared by:

Chandra Hardeen
Manager, Homelessness Services
Community Services

Recommended by:

Adrienne Jugley, MSW, RSW, CHE
Commissioner
Community Services

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was prepared in consultation with Kayla De Pauw, Program Financial Specialist, and reviewed by Cathy Cousins, Director, Homelessness Services and Community Engagement.



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January 11, 2019

Ann-Marie Norio, Regional Clerk
Niagara Region
1815 Sir Isaac Brock Way
Thorold, ON L2V 4T7

Dear Ms. Norio:

At their January 11, 2019 meeting, the Niagara Regional Housing Board of Directors, passed the following motion as recommended in report NRH 1-2019:

1. That the Niagara Regional Housing Board of Directors **RECOMMENDS** to Regional Council:
 - (i) That a gross capital budget adjustment in the amount of \$1,075,475 gross and \$0 net **BE RECEIVED** (and **INITIATED**) for the Social Housing Apartment Improvement Program and that the adjustment **BE FUNDED** by Ministry of Housing - SHAIP grant.

Your assistance is requested in moving report NRH 1-2019 through proper channels for approval.

Sincerely,

Chair



REPORT TO: Board of Directors of Niagara Regional Housing

SUBJECT: Budget Adjustment - Social Housing Apartment Improvement Program (SHAIP)

RECOMMENDATION

1. That the Niagara Regional Housing Board of Directors **RECOMMENDS** to Regional Council:
 - (i) That a gross capital budget adjustment in the amount of \$1,075,475 gross and \$0 net **BE RECEIVED** (and **INITIATED**) for the Social Housing Apartment Improvement Program and that the adjustment **BE FUNDED** by Ministry of Housing - SHAIP grant.

KEY FACTS

- The object of the SHAIP initiative is to assist in the repair and retrofit of existing social housing to address capital needs, improve energy and water efficiency and reduce greenhouse gas emissions
- The Ministry of Housing confirmed a total allocation of SHAIP funding for the 2017-18 year of \$2,824,268 for NRH in Q1 2018. Of the total confirmed allocation, \$2,683,055 is specifically allocated for capital funding, and \$141,213 is specifically allocated for administrative (operating) funding. The amount previously included in the approved 2018 capital budget pertaining to this project was \$1,607,580 based on confirmed funding from the Ministry of Housing in late 2017.
- In accordance with Budget Control By-law No. 2017-63, in-year receipt of funding requiring a budget adjustment in excess of \$1 million for capital and operating programs requires Regional Council approval.
- These adjustments have no tax levy impact on the approved 2019 NRH Capital Budget or the 2019 NRH Operating Budget.

FINANCIAL CONSIDERATIONS

The below table depicts the confirmed Ministry of Housing SHAIIP funding compared to the funding originally budgeted for as part of previously approved NRH budgets:

Description	Capital (SHAIIP - Project 20000814)	Operating (Admin)	Total
Confirmed Funding	\$ 2,683,055	\$ 141,213	\$ 2,824,268
Previously Budgeted	1,607,580	72,918	1,680,498
Budget Adjustment	\$ 1,075,475	\$ 68,295	\$ 1,143,770

ANALYSIS

In August 2017 the Ministry of Housing (MHO) announced the Social Housing Apartment Improvement Program (SHAIIP) for eligible high-rise apartment buildings across Ontario. The program supports the implementation of the province's Climate Change Action Plan. The program funding supports retrofit activities that reduce greenhouse gas emissions in social housing apartment buildings.

The key outcomes expected from the program include:

- Reduced greenhouse gas emissions
- Enhanced living accommodations for low income tenants to modern standards
- Reduced operating costs for social housing providers through saving derived from the retrofit activities, which will serve to improve the sustainability of the current social housing stock
- Support the greenhouse gas retrofit sector and create local jobs in communities across the province

Due to the limited number of social housing buildings over 150 units or more in the Niagara Region, the Ministry requested that NRH submit a business case confirming we have buildings suitable for the investment and detailing how the SHAIIP funding would be used. Staff submitted the business case in November 2017 identifying work to be completed at four NRH owned properties.

NRH will use the results of commissioned Building Condition Assessments and Energy Audits for the Housing Providers to help identify qualified buildings in the housing provider portfolio.

The SHAIIP program allows 5% administration costs. Staff is currently analyzing the administrative requirements necessary to continue to successfully deliver the program.

ALTERNATIVES REVIEWED

N/A

RELATIONSHIP TO NRH and/or COUNCIL STRATEGIC PRIORITIES

Niagara's Housing and Homelessness Action Plan

NRH Business Plan Goal #1: Assist housing providers in maintaining financial stability.

NRH Business Plan Goal #2: Build healthy, sustainable housing communities.

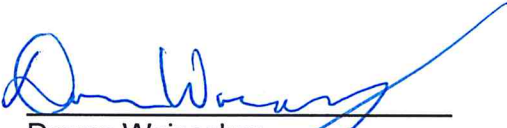
ORIGIN OF REPORT

This report has been brought forward by staff

OTHER PERTINENT REPORTS

NRH 1 – 2018 (18-168-4.1.) SHAIIP – Social Housing Apartment Improvement Program

Submitted by:


Donna Woiceshyn
Chief Executive Officer

Approved by:


Chair

This report was prepared by Donna Woiceshyn, CEO in consultation with Dan Ane, Manager Program Financial Support

MEMORANDUM**PHD-C 01-2019**

Subject: Number of Persons Impacted by a Death by Suicide
Date: March 19, 2019
To: Public Health & Social Services Committee
From: M. Mustafa Hirji, Medical Officer of Health & Commissioner (Acting)
Renata Faber, Manager, Chronic Disease & Injury Prevention

At the January 8, 2019 meeting of PHSSC, a member of Council requested to know how many persons are impacted by a death by suicide. This memo summarizes the latest research evidence on this topic.

It was noted by a Councillor that he understood that six persons are impacted by a death by suicide. This is indeed the most widely used statistic. However, recent research implies that it is much higher. Central to this finding is a greater appreciation that those impacted by a death from suicide extend much more widely than family and friends, even to those who may passively learn about the death.

- In 2016, a study estimated the proportion of the population exposed to suicide and assessed impact on psychiatric and psychosocial morbidity. Exposure was defined as knowing someone who had died from suicide, whether one was close to that person or not. The study found a doubling of risks for diagnosable depression, for diagnosable anxiety, and for suicidal ideation.¹
- In 2017, a meta-analysis examined pooled estimates of exposure to suicide among family, friends/peers, and all relationships for youth and adults. Significantly more people were exposed to suicide in friends and peers than within families.²
- A study conducted in 2018 looked at how many people were affected by suicide and estimated the number to be 135, significantly higher than six.³

¹ Cerel, J., Maple, M., van de Venne, J., Moore, M., Flaherty, C., & Brown, M. (2016). Exposure to Suicide in the Community: Prevalence and Correlates in One U.S. State. *Public health reports* (Washington, D.C. : 1974), 131(1), 100-7.

² Andriessen K, Rahman B, Draper B, Dudley M, Mitchell PB. Prevalence of exposure to suicide: A meta-analysis of population-based studies. *Journal of Psychiatric Research*. 2017; 88:113-120. doi:10.1016/j.jpsychires.2017.01.017.

³ Cerel, J., Brown, M. M., Maple, M., Singleton, M., Venne, J., Moore, M. and Flaherty, C. (2018), How Many People Are Exposed to Suicide? Not Six. *Suicide Life Threat Behav*. doi:10.1111/sltb.12450

- Another 2018 study explored how responses to suicide death vary not just on kinship, but on the nature and perceptions of the relationship, further evidence to support that the number of people impacted are much higher than originally conceived.⁴

These recent research findings suggest that a large circle of people are affected by a death by suicide. A few public health implications naturally flow from this:

1. Suicidal ideation doubles with exposure to suicide, even if only in a limited way, underscoring the risk of contagion of suicidal behaviour with unsafe public discourse or descriptions of suicide.
2. There may be significant need for clinician services or support following a death by suicide.
3. Prevention of deaths by suicide can have wide-reaching public health benefits.

Respectfully submitted and signed by

M. Mustafa Hirji, MD MPH FRCPC
Medical Officer of Health & Commissioner (Acting)
Public Health & Emergency Services

⁴ Cerel, J., & Sanford, R. L. (2018). It's Not Who You Know, It's How You Think You Know Them: Suicide Exposure and Suicide Bereavement. *Psychoanalytic Study of the Child*, 71(1), 76–96. <https://doi.org/10.1080/00797308.2017.1415066>

Subject: Housing and Homelessness Action Plan Update 2018

Report to: Public Health and Social Services Committee

Report date: Tuesday, April 16, 2019

Recommendations

That this report **BE RECEIVED** for information.

Key Facts

- The purpose of this report is to update Council on actions completed in 2018 related to *A Home for All*, Niagara's 10-Year Housing and Homelessness Action Plan.
- Consolidated Municipal Service Managers (CMSM) are required to report to the public and Ministry of Municipal Affairs and Housing by June 30 each year with respect to efforts of the previous year. This report serves to meet the requirement for 2018.
- The 10-Year Plan includes a complete vision for providing *A Home for All* by addressing homelessness and access to affordable housing in response to identified local needs.
- *A Home for All* (2014 – 2023) was approved by Council in November 2013 to fulfil the *Housing Services Act, 2011, section 6*, which requires municipalities to establish and implement a ten-year plan to address housing and homelessness needs in their community.
- In 2018 *A Home for All* continued to shift in focus to activities which increase opportunities and options across the housing continuum, build capacity and improve effectiveness of the housing system.
- 2018 saw significant effort to align the work of Community Services, Niagara Regional Housing, Planning and Development, and Finance to further support a regional affordable housing strategy and ensure the next five years of the plan maximize coordinated efforts, address Niagara's local need and align with provincial priorities and policy direction.

Financial Considerations

The resources required to facilitate the management of the Housing and Homelessness Action Plan (HHAP) are provided within the approved annual budget.

Analysis

A Home for All, Niagara's Housing and Homelessness Action Plan was developed in response to the *Housing Services Act 2011, section 6*, which requires municipalities to

establish and implement a ten-year plan to address local housing and homelessness needs. *A Home for All* was developed in consultation with 1,290 community members, approved by Niagara Regional Council, and submitted to the Ministry of Municipal Affairs and Housing in 2013. The work of *A Home for All* began in 2014, and the Ministry continues to support its work.

A Home for All has enabled the coordination of responses to address community housing and homelessness needs. *A Home for All* provides a complete vision for addressing local needs related to homelessness and access to affordable housing. All actions within *A Home for All* support achievement of the following four goals:

Goal 1 – Housing people who do not have a home.

Goal 2 – Helping people find and retain a home.

Goal 3 – Increasing opportunities and options across the housing continuum.

Goal 4 – Building capacity and improving the effectiveness of the housing system.

A Home for All outlines 80 actions to improve the service system and outcomes for individuals, by addressing identified needs that exist within Niagara through prevention, emergency interventions, services and supports, social and market housing, and system improvements. In 2018:

- 3,615 households accessed the Housing Stability Plan.
- 826 households were issued Niagara Emergency Energy Funds (NEEF).
- 1,835 households were supported in Niagara's emergency shelters.
- 136 Housing First program participants were in housing with supports.
- 1,370 households received rent supplements and housing allowances.
- 2,684 households were provided public housing rent-geared-to-income units.
- 3,601 households were provided non-profit and co-operative housing units.
- 40 Home for Good supportive housing participants were in housing.

The systems-level work of *A Home for All* requires engagement of many internal and community partners. The structure to support broad engagement includes the *A Home for All* Taskforce and five working groups developed in 2015 to support ongoing work. Each working group is led by a senior leader from a community partner organization and involves membership from a cross-section of service providers and other partners. Support for the working groups is provided by staff from Community Services, Planning and Development Services, Public Health and Emergency Services, and Niagara Regional Housing (NRH). The working groups and their leaders include:

- Service Hubs (Christine Clark Lafleur, Executive Director, Port Cares)
- 'No Wrong Door' service approach, (Mike Taylor, Executive Director, Youth Resources Niagara),
- Homelessness Prevention, (Michael Lethby, Executive Director, The RAFT),
- Housing First (Elisabeth Zimmermann, Executive Director, YWCA Niagara Region), and

- Affordable Housing Innovation (Lori Beech, Executive Director, Bethlehem Housing and Support Services).

The 80 actions outlined in *A Home for All* are staged over a number of years with some actions to be completed in the immediate (2014), short-term (2015-2016), mid-term (2017-2019) and long-term (2020-2023). While immediate and short-term actions focused on homelessness services, mid-term actions focus more on increasing available affordable and rental housing and building system capacity.

Mid-term actions increase the connection between activities of Community Services, Planning and Development Services and NRH, as well as provincially funded systems such as the Local Health Integrated Network (LHIN). By the end of December 2018, 24 mid-term actions were 91% complete and can be found in Appendix A.

Highlighted 2018 accomplishments related to the 24 mid-term (four - six year) actions of *A Home for All* include:

Goal 1: Housing people who do not have a home

- Operationalized 40 new community based Home for Good supportive housing units.
- Initiated capital/construction of 23 new apartments for Home for Good participants (scheduled completion of eight units by first quarter of 2020, at the latest and 15 units by second quarter of 2021, at the latest).
- Increased shelter capacity by 45 beds in response to increased system pressures.
- Introduced shelter standards for Regionally funded emergency shelters.
- Over 75 staff at funded agencies and other community partners were trained in harm reduction, motivational interviewing, person-centered service delivery, and human trafficking awareness.

Goal 2: Helping people find and retain a home

- NRH housing allowance program provided a set allowance for 639 applicants on waitlist.
- NRH granted a forgivable loan to help 47 households buy their first home.
- Community Services launched a landlord engagement pilot to recruit landlords for Housing First and Home for Good to serve those struggling with chronic homelessness.
- NRH identified St. Catharines' Manchester community as in need of enhanced community development. In collaboration with Niagara College and the RAFT, NRH hosted a family day, extended summer camps with weekend programming and introduced a social enterprise through two Manchester youth paid as "Community Attendants" to help maintain the grounds. These positive initiatives resulted in a dramatic increase in community engagement and reduction in social issues.

Goal 3: Increasing opportunities and options across the housing continuum

- NRH successfully negotiated rent supplement agreements with six of eight housing providers that reached End of Operating Agreements.
- NRH continued to develop new units, with the 85-unit Carlton Street (St. Catharines) development 92% complete (end of 2018), and eight units at the Roach Avenue (Welland) Intensification project 22% complete. Additionally, NRH purchased two buildings on St. David's Road and Ormond Street in Thorold (adjacent properties) through Social Infrastructure Fund (SIF Year 3) Program, which will add six units to NRH portfolio with potential to create five more units in future.
- Established an **Affordable Housing Working group** with Community Services, Niagara Regional Housing, Planning and Development, and Finance to coordinate and maximize efforts to support the Region's affordable housing efforts
- Recruitment of development industry consultant within Planning and Development Services.
- Further to the efforts of the Affordable Housing Working group staff retained the Canadian Center for Economic Analysis (CANCEA) to develop a Niagara Housing Statement to inform *A Home for All* and the *Official Plan* by identifying housing supply and demand for Niagara Region and all 12 local area municipalities out to 2041. Data will be available in April 2019.
- Further to the collaboration of the Affordable Housing Working group, staff from all areas have come together to meet with numerous interested developers to understand local development interests and describe what incentives and supports are available to local development.
- Functioned as an information resource for local area municipalities as several initiated their own Affordable Housing efforts (Fort Erie, Niagara Falls, and Port Colborne).
- Niagara Regional Housing, Homelessness Services, and the Canadian Mortgage and Housing Corporation partnered with the City of St. Catharines to host the 2018 National Housing Day event for 110+ attendees on the topic of "A Local Development Toolkit".

Goal 4: Building capacity and improving the effectiveness of the housing system

- Completed Niagara's second homelessness enumeration in March 2018.
- Enlisted Whitesell & Associates to complete a review of the homelessness services system.
- Launched a Lived Experience Advisory group to engage and receive input in service delivery and system planning from those with experience of homelessness.
- Worked with Niagara Region's Internal Control and Organizational Performance (ICOP) division to develop a draft theory of change and metrics for the work of years six to ten to fulfil provincial guidance for the five-year review of 10-year Plan (2018).
- Worked with Planning and Development to ensure that the strategies identified for the next five years of the HHAP also align with requirements and recommendations of the Official Plan.

A large portion of the work of *A Home for All* in 2018 was a five-year review of the 10-year Plan. The *Housing Services Act, 2011* mandates that service managers conduct a review and update of their 10-year plan at least every five years. The review provided an opportunity to make required updates to *A Home for All* to align with provincial priorities outlined in the Ministry's 2016 *Policy Statement: Service Manager Housing and Homelessness Plans* and the *Five-Year Review of Housing and Homelessness Plans* guide, released in April 2018.

Specifically, the policy requires CMSM's to develop strategies for years six to ten which support:

- Increased coordination with Indigenous peoples, service and housing providers.
- Strengthening partnerships across sectors to improve client access across service systems, including a move to human services integration.
- A more coordinated approach with Ontario's land use planning framework.
- An active role for the private sector in providing a mix and range of housing including affordable rentals and affordable ownership.

The update will also ensure the Plan remains responsive to recent changes in the community and housing market that impact the local demand for homelessness services and affordable housing over the long-term.

Niagara is well positioned to respond to these requirements. By the end of 2018 the following work which support these goals had been initiated:

- Increased engagement, consultation, and information sharing with Indigenous service and housing providers, non-profit and co-operative housing providers, the local health system, private developers and local municipalities.
- Enlistment of the Canadian Centre for Economic Analysis (CANCEA) to complete a Niagara Housing Statement to describe the current and future demand for a mix of housing options across the region and within each of the 12 local area municipalities.
- Engagement of ICOP to assist in development of required Key Performance Indicators (KPIs) for years six to ten of *A Home for All*.

The annually published Community Update will be distributed to the public through the Region's partner agencies as well as being available on Niagara Region's website.

Alternatives Reviewed

Not applicable. Reporting is required under the *Housing Services Act, 2011* per its regulations as noted above.

Relationship to Council Strategic Priorities

Not applicable.

Other Pertinent Reports

- COM 10-2018 Housing and Homelessness Action Plan Update 2017, Community Action Plan to Help People Find and Keep Housing
- COM 12-2017 Housing and Homelessness Action Plan Update 2016, Community Action Plan to Help People Find and Keep Housing
- COM 17-2016 Housing and Homelessness Action Plan Update 2015, Community Action Plan to Help People Find and Keep Housing
- COM 16-2015 Housing and Homelessness Action Plan Update 2014, Community Action Plan to Help People Find and Keep Housing
- COM 35-2013 Final Version of A Home for All: Niagara's 10-Year Community Action Plan to Help People Find and Keep Housing.

Prepared by:

Jeffrey Sinclair
Homelessness Action Plan Advisor
Community Services

Recommended by:

Adrienne Jugley, MSW, RSW, CHE
Commissioner
Community Services

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was prepared in consultation with Chandra Hardeen, Manager Homelessness Services, Wendy Thompson, Community Resource Unit Manager Niagara Regional Housing and Alexandria Tikky, Planner Planning and Development Services, and reviewed by Cathy Cousins, Director Homelessness Services & Community Engagement.

Appendices

Appendix A A Home for All Mid-Term Accomplishments

7

Appendix A - Housing and Homelessness Action Plan (HHAP) Mid Term Accomplishments

A listing of accomplishments pertaining to the medium term or longer HHAP actions, as of December 31, 2018

Goal 1: House people who do not have a home

Mid-Term Actions (Years 4-6)		Accomplishments to Date
1.3a	Refine homelessness service system mapping based on the results of the homeless system review	<ul style="list-style-type: none"> • Enlisted Global Information Systems (GIS) interns in 2017 and 2018 to develop and refine map of Niagara's homelessness system, to be completed March 2019. • Niagara's second homelessness enumeration, completed March 2018, gathered information to increase understanding of those experiencing homelessness in Niagara.
1.3b	Provide tools/resources that help support agencies that provide homelessness services in accordance with system review results	<ul style="list-style-type: none"> • Increased shelter capacity by 45 beds in response to increased system pressures. • Provided agency staff with training in best practices, including: <ul style="list-style-type: none"> ○ 39 staff received training in human trafficking awareness (November 2018) ○ 22 staff received training in harm reduction (April 2018) ○ 25 staff received training in person-centered service delivery (March 2018) ○ 15 staff received training in motivational Interviewing (February 2018) ○ 25 staff received training in Intensive Case Management (November 2017) ○ 99 staff received training in trauma counselling level 1 (April to May 2017) ○ 55 staff received training in Housing First core principles (March 2017). • Introduced Shelter Standards to Regionally funded emergency shelters. • Engaged landlord relationship specialist as pilot project to increase engagement of private sector landlords and increase market rental units for clients in Niagara's Housing First and Home for Good programs. • Ongoing support for community of practice (launched in 2017) to support knowledge sharing, innovation and adaption of best practices, and improved supports for clients among Niagara's Intensive Case Managers.
1.3c	Advocate for additional funding that is outcome-based in order to promote the Housing First principle of getting people housed more permanently	<ul style="list-style-type: none"> • Operationalized 40 new community based Home for Good supportive housing units in 2018. • Successful application to Ministry of Municipal Affairs and Housing attracted \$5.5 million dollars to Niagara for "Home for Good" to transition people out of chronic homelessness by creating 63 incremental units of housing with case management and wrap around supports, including: <ul style="list-style-type: none"> ○ Introduction of up to 40 new community-based supportive housing units. ○ Construction of 23 new units of supportive housing.

Goal 2: Help people find and retain their home

Mid-Term Actions (Years 4-6)		Accomplishments to Date
2.3a	Advocate for flexibility in the use of funding from other levels government (e.g. shifting funding between programs etc.)	<ul style="list-style-type: none"> • In 2018, NRH's Housing Allowance program provided a set allowance to 639 applicants on waitlist to help with affordability in private market until they can be housed in rent-geared-to-income unit (up from 505 households at the end of 2017). • NRH granted a forgivable loan to help 47 households buy their first home through Welcome Home Niagara in 2018 (up from 33 in 2017). • Changes to provincial (CHPI) and federal (HPS) funding prior to 2017 included a shift to more flexible funding use.
2.6a	Explore opportunities that help address transportation concerns of vulnerable populations by promoting better access to services	<ul style="list-style-type: none"> • Niagara Region and its local municipal transit partners continued their coordinated pursuit of significant transit service enhancements that would improve access, frequency, and reliability for users. In upcoming years, such enhancements are expected to include a new transit route pilot to west Niagara, strengthened connections with local feeder routes, an expanded bus fleet, and improvements to service frequency on main routes from every hour to every half-hour.

Goal 3: Increase opportunities and options across the housing continuum

Mid-Term Actions (Years 4-6)		Accomplishments to Date
3.3a	Explore off-reserve Aboriginal housing opportunities that can help augment current market options in collaboration with Aboriginal community	<ul style="list-style-type: none"> • Ongoing support of Indigenous Homeward Bound programs piloted in Niagara by Aboriginal service providers. • National Housing Day event hosted at Niagara Regional Native Centre in order to support dialogue and collaboration between Aboriginal and non-Aboriginal partners.
3.3b	Broaden access to the Niagara Renovates program to expand support for low income households in partnership with local area municipalities	<ul style="list-style-type: none"> • NRH provided funding to 56 (2017) and 49 (2018) low to moderate income homeowners to complete much needed repairs.

Mid-Term Actions (Years 4-6)		Accomplishments to Date
3.3c	Undertake financial sustainability analysis to help plan for and mitigate future step down of federal funding for social housing and impact of funding horizons under the Investment in Affordable Housing (IAH) programs	<ul style="list-style-type: none"> • NRH commissioned Building Condition Assessments (BCAs) for all non-profit housing providers and engaged a consultant to analyze the results to determine future capital funding needs. Currently, the consultant is assisting in the development of a loan program for housing providers. • NRH formed new relationships to preserve rent-geared-to-income units by negotiating rent supplement agreements with six of eight housing providers that reached End of Operating Agreements. • In 2017 NRH participated in Social Housing Infrastructure Fund and Investment in Affordable Housing Extension (IAHE) programs launched by the province to address step down of IAH.
3.3d	In concert with other Ontario municipalities, continue advocating for: <ul style="list-style-type: none"> • On-going, predictable funding for new housing initiatives • Sustained federal funding to maintain affordability in existing social housing post end of operation agreement (i.e. after mortgage/debt maturity) • Funding to repair, renovate and renew aging social housing stock 	<ul style="list-style-type: none"> • Supported St. Catharines in its successful application for provincial funding for development charge waivers. (Note - this program was subsequently cancelled by the province.) • In 2017, five housing provider agreements expired, representing a total of 142 units. NRH was successful in renegotiating rent supply agreements with four providers, with remaining provider offering rental assistance to their tenants using their own revenue. As a result, there was no impact on renters at these five housing providers. • NRH continued to develop new units, with the 85-unit Carlton Street (St. Catharines) development 92% complete (end of 2018), and eight units at the Roach Avenue (Welland) Intensification project 22% complete. Additionally, NRH purchased two buildings on St. David's Road and Ormond Street in Thorold (adjacent properties) through Social Infrastructure Fund (SIF Year 3) Program, which will add six units to NRH portfolio with potential to create five more units in future.
3.5a	Continue to implement Regional Policy Plan policies at the local level which promote a range of ownership housing options by sustaining existing stock through renovation, pursuing alternative development	<ul style="list-style-type: none"> • Enlisted Canadian Center for Economic Analysis (CANCEA) to develop Niagara Housing Statement to inform <i>A Home for All</i> and the <i>Official Plan</i> by identifying housing supply and demand for Niagara Region and all 12 local area municipalities out to 2041. Data to be available April 2019. • In 2017 staff from Community Services, Planning and Development Services, Enterprise Resource Management Services (Finance) and Niagara Regional Housing launched an inter-departmental initiative to develop an Affordable Housing Strategy which coordinates efforts to comprehensively address housing affordability and availability within Niagara Region.

Mid-Term Actions (Years 4-6)		Accomplishments to Date
	standards, promoting small lot singles, piloting innovative seniors housing options and establishing affordability targets	
3.5b	Expand and provide assistance to local municipalities on the use of development tools such as community improvement plans, brownfield incentives, targeted tax relief, and other forms of municipal capital facility bylaws	<ul style="list-style-type: none"> • Engaged with local area municipalities to provide provided feedback and direction regarding municipal studies, policy amendments, and other initiatives to address housing affordability. • Inter-departmental affordable housing strategy launched (See 3.5a above).
3.5c	Promote incentives that encourage private market investment in new affordable housing, and reinvesting and retention of existing affordable housing through community improvement plans and the Smarter Niagara initiative	<ul style="list-style-type: none"> • ICOP completed a value for money review of various grants and incentive programs. The review evaluated existing performance measures, reviewed the working relationship between the Region and Local Area Municipalities (LAMs) and benchmarked program administration against similar municipalities, cities and regions. Continued work on the recommendations of the incentive review is being completed by a working group consisting of representatives from Planning and Development, Economic Development, Finance, and ICOP. The working group will make recommendations to the leadership team in Q2/Q3 of 2019. • Inter-departmental affordable housing strategy launched (See 3.5a above).
3.5d	Advocate to senior governments for incentives to assist private and affordable housing landlords to make improvements to existing rental housing stock aimed at enhancing energy efficiency and reducing utility costs for tenants	<ul style="list-style-type: none"> • NRH hosted information sessions in collaboration with Canada Mortgage & Housing Corporation (CMHC) and the Housing Services Corporation (HSC) for housing providers to learn about the newly announced Federal Co-Investment Fund and the new Social Housing Sector Bank financing tool. NRH actively fostered and encouraged housing providers to participate in expanding the affordable housing supply and assists in applying for funds, building a business case and planning for new development. • In 2017, nearly \$6 million was issued through NRH to address capital repairs at non-profit housing providers through Social Housing Infrastructure Program (SHIP), while \$268,843 was provided through Social Housing Electrical Efficiency Program (SHEEP).

Goal 4: Build capacity and improve the effectiveness of the housing system

Mid-Term Actions (Years 4-6)		Accomplishments to Date
4.3a	Work with community to create and build innovative affordable housing solutions in order to take advantage of future funding opportunities	<ul style="list-style-type: none"> • NRH, Homelessness Services, and CMHC continue to annually partner to offer National Housing Day forums each November to broaden local discussion of key topics related to development of local affordable housing solutions. Events engage local planners, private developers, non-profits, Faith groups and other partners. <ul style="list-style-type: none"> ○ 2018 - partnered with City of St. Catharines to host event for 110+ attendees on topic of “A Local Development Toolkit”. ○ 2017 - partnered with Niagara Regional Native Friendship Center to host event for 70+ attendees on topic of “Streamlining the Development Process for Affordable Housing”. ○ 2016 - developed partnership and inaugural forum using new format to host event for 50+ attendees.
4.3b	Strengthen relationships with the private development sector and economic development sector in order to continue to build support for the housing agenda	<ul style="list-style-type: none"> • Recruitment of Development Industry Consultant. • Inter-departmental affordable housing strategy launched (See 3.5a above).
4.6a	Using the HHAP as an aligning vehicle for future housing initiatives, both regionally and in local area municipalities	<ul style="list-style-type: none"> • Engaged local area municipalities (See 3.5b above). • Inter-departmental affordable housing strategy launched (See 3.5a above). • Developed project charter in 2017 for mid-term work of HHAP which supports alignment of housing and other initiatives and development of metrics and targets for actions related to HHAP.
4.6b	Continue to work in conjunction with Niagara Homelessness Advisory Committee and Community Advisory Board (CAB) to align federally funded homelessness initiatives with priorities as expressed in the Homelessness Service	<ul style="list-style-type: none"> • Restructured group membership to improve connectivity between CAB and the <i>A Home for All</i> Task Force.

Mid-Term Actions (Years 4-6)		Accomplishments to Date
	Community Plan and the HHAP	
4.6c	Continue to collaborate and align support initiatives with the LHIN as an important service manager and funder, and with community health centres as an important service provider	<ul style="list-style-type: none"> • Collaborated with Niagara North Family Health Teams to introduce Primary Care in homeless shelters. • Community Services representation on Local Health Integrated Network (LHIN) Niagara Sub-region Anchor table to explore opportunities for human services integration between health services and homelessness services. • Niagara's Home for Good incorporates mental health and addiction supports in the comprehensive support program for clients • Launched a mental health social worker assessment and referral pilot in the shelter system for longer stay clients
4.6d	Explore opportunities for community-oriented funding incentives such as an endowment fund for donation matching, donor-matched government funding and no/low cost community group loans to support improvements in housing supply and related initiatives	<ul style="list-style-type: none"> • Engaged with Faith community and service clubs interested in supporting development of new affordable housing.
4.6e	Investigate approaches to reduce administrative burden and enhance capacity of non-profit agencies to deliver services in partnership with funders and non-profit organizations	<ul style="list-style-type: none"> • Roll out and training of a new data reporting tool, Homelessness Individuals and Families Information System (HIFIS).
4.9a	Develop and publish an annual community report	<ul style="list-style-type: none"> • Worked with ICOP to develop draft theory of change and metrics for work of years 6-10 to fulfil provincial guidance for the five-year review of 10-year plan (2018).

Mid-Term Actions (Years 4-6)		Accomplishments to Date
	card on HHAP priorities and progress	<ul style="list-style-type: none"> • Completed review of report cards from other Ontario municipalities to identify metrics that best describe experience of homelessness in Niagara (2016). • Initiated discussions with community partners regarding appropriate content for community report card (2016).
4.9b	Link/expand neighbourhood mapping (e.g. Niagara Prosperity Initiative) to further support housing reports, information and messaging	<ul style="list-style-type: none"> • Design of homelessness system map enables reference to neighbourhood mapping and indicators in Niagara Prosperity Initiative map. (See 3.1a above).
4.9c	Undertake a formal review of the HHAP by the five year mark to determine plan effectiveness and to adjust strategic directions for the next five years where necessary	<ul style="list-style-type: none"> • Review underway with planned consultations for Age Friendly Niagara, Housing Providers, and Indigenous providers planned for early 2019 (See also 4.9a above). • Worked with community partners in 2016 to identify a need to increase priority of local Indigenous population as well as LGBTQ2S population within core work of HHAP. Planned in 2017 for five-year HHAP review to be completed by late 2018 or early 2019.
4.9d	Partner with academic community to advance research and analyze data to support planning, attract funders and generate interest in ongoing housing and homelessness research	<ul style="list-style-type: none"> • Increased ability to engage academic research to support work of the HHAP by creating a pipeline to Brock University for course based projects, including projects related to shelter and system change completed in 2017.

Subject: Seniors Services Homes – Volunteer Report

Report to: Public Health and Social Services Committee

Report date: Tuesday, April 16, 2019

Recommendations

That this report **BE RECEIVED** for information.

Key Facts

- The purpose of this report is to highlight the contribution level of volunteers and students to the Long-Term Care homes in 2018.
- Four hundred and eighty volunteers provided 52,445 hours of service and 456 students completed 75,555 placement hours.

Financial Considerations

The monetary value of volunteer hours, when calculated at the 2018 minimum wage rate was \$734,230. The monetary value of student contributions, when calculated at the 2018 student minimum wage rate was \$993,548. Volunteer fundraising initiatives also raised \$261,828 in donations, used to purchase equipment, program supplies and services.

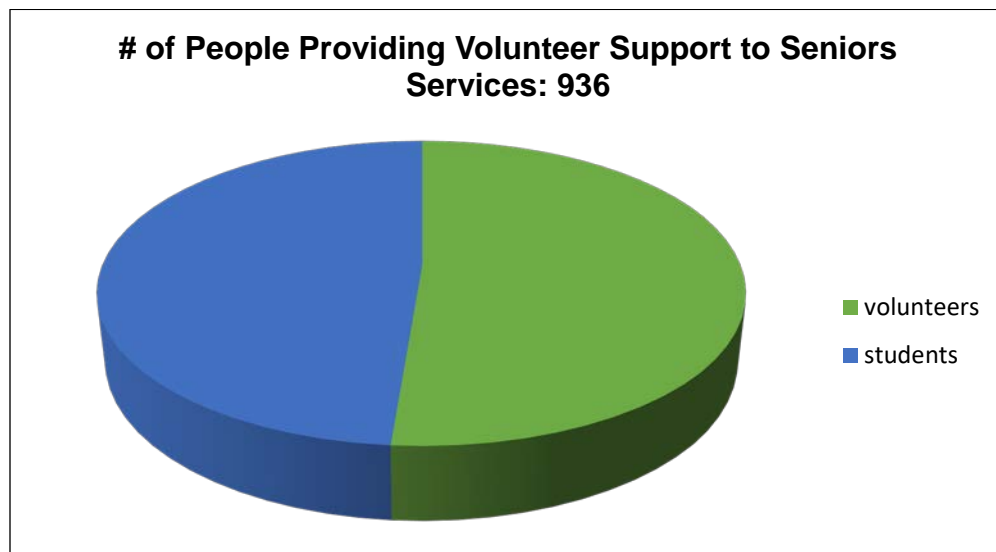
Analysis

The Benefit of Volunteerism to the Residents of Long-Term Care Homes

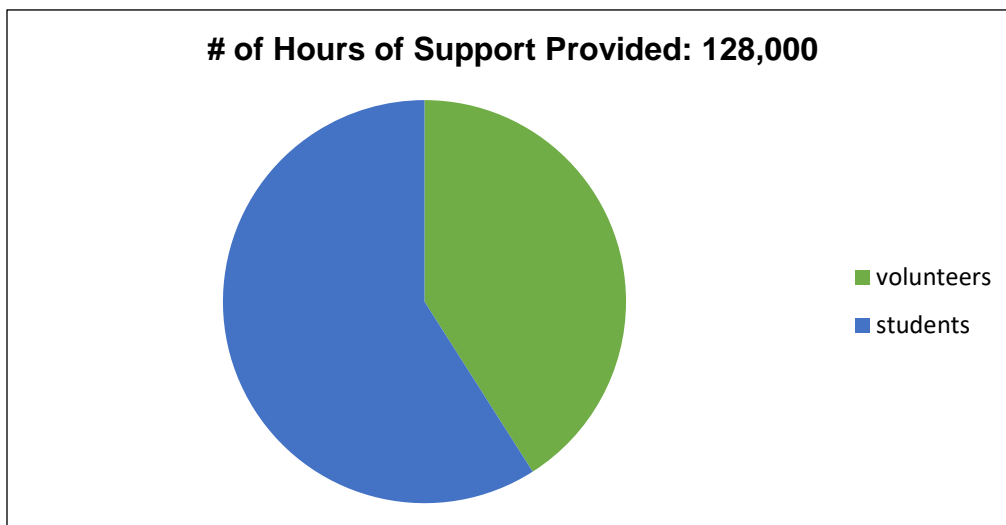
Seniors Services is grateful for and values the volunteer contributions made by members of the public, community groups and students. Volunteers support a wide range of programs across the eight homes including meal time assistance, friendly visiting, pet visits, help with cards and games, bingo, sing-a-longs, birthday parties, pastoral visits and services and pubs. Volunteers help to keep the gardens beautiful, operate tuck shops and help coordinate fundraising events. Volunteers make an invaluable difference to the lives of Niagara Region's Long-Term Care home residents.

Volunteer and Student Contributions

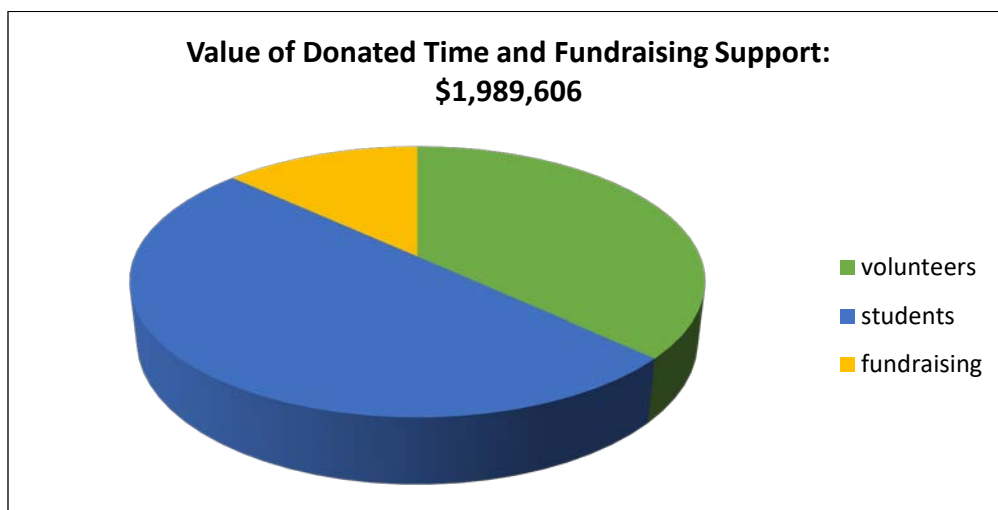
In 2018 there were 936 people who donated their time to Seniors Services including 480 volunteers and 456 students as depicted in the following chart.



Volunteers contributed 52,445 hours and students contributed 75,555 hours in 2018. In total, they represent 128,000 hours of support as captured below. The combined contributions represent the equivalent of 61.5 Full Time Equivalent (FTE's) staff.



The value of volunteer support when equated at the 2018 minimum wage rate of \$14.00 per hour is \$734,230. The value of student support when equated at the 2018 student minimum wage rate of \$13.15 per hour is \$993,548. In 2018 fundraising efforts to support the residents and clients in Seniors Services generated \$261,828. The total sum of all three categories of contribution as follows is \$1,989,606.



Alternatives Reviewed

Not applicable.

Relationship to Council Strategic Priorities

Not applicable.

Other Pertinent Reports

Not applicable.

Prepared by:

Henri Koning
Director
Community Services

Recommended by:

Adrienne Jugley, MSW, RSW, CHE
Commissioner
Community Services

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was prepared in consultation with LTC Resident Community Program Managers Lisa Coxon, Charlene Ferns, Dave Stortz, Aimie Taylor, Antonietta Todd, Richard Van Huizen, Tammy Wright, and Stefani Tworyczuck, Volunteer Coordinator, and reviewed by Henri Koning, Director, Seniors Services.

Subject: Medical Directors Annual Report 2018 – Long-Term Care Homes

Report to: Public Health and Social Services Committee

Report date: Tuesday, April 16, 2019

Recommendations

That this report **BE RECEIVED** for information.

Key Facts

The purpose of this report is to provide Committee and Council with summarized findings identified by the Medical Directors of the Region's eight Long-Term Care homes (LTCH) in their 2018 Annual Medical Directors' Reports.

Under the LTCH Act each home is required to have a Medical Director, who must be a physician. The Medical Director fulfills a number of functions including: liaising with the Director of Resident Care on matters related to medical care in the home, serves as a member of the Medical Advisory Committee and acts as co-chair on the Professional Advisory Committee in the LTC home, reviews, advises and revises medical and clinical policies / procedures based on best practice, ensures 24 / 7 medical coverage for residents, and acts in a supervisory capacity relative to Attending Physicians (holds Attending Physicians accountable to meet the homes policies, procedures and protocols for medical service).

Key recommendations identified by the Medical Directors are as follows:

- Continue to focus on staff training and capacity building to ensure residents' increasingly complex needs can be met in the Long-Term Care homes, minimizing the need for transfers to hospital.
- Continue to advocate for enhanced funding to increase Personal Support Worker (PSW) and recreation staffing levels.
- Enhance the level of support offered to families and caregivers related to the transition into Long-Term Care and in understanding the progression of dementia.

Financial Considerations

As per the Ministry of Health and Long-Term Care's (MOHLTC) Level-of-Care Per Diem Funding policy, Medical Directors are issued payment of \$.30/resident day through the Nursing and Personal Care envelope (MOHLTC/Hamilton Niagara Haldimand Brant Local Health Integration Network (HNHB LHIN) funding.

Analysis

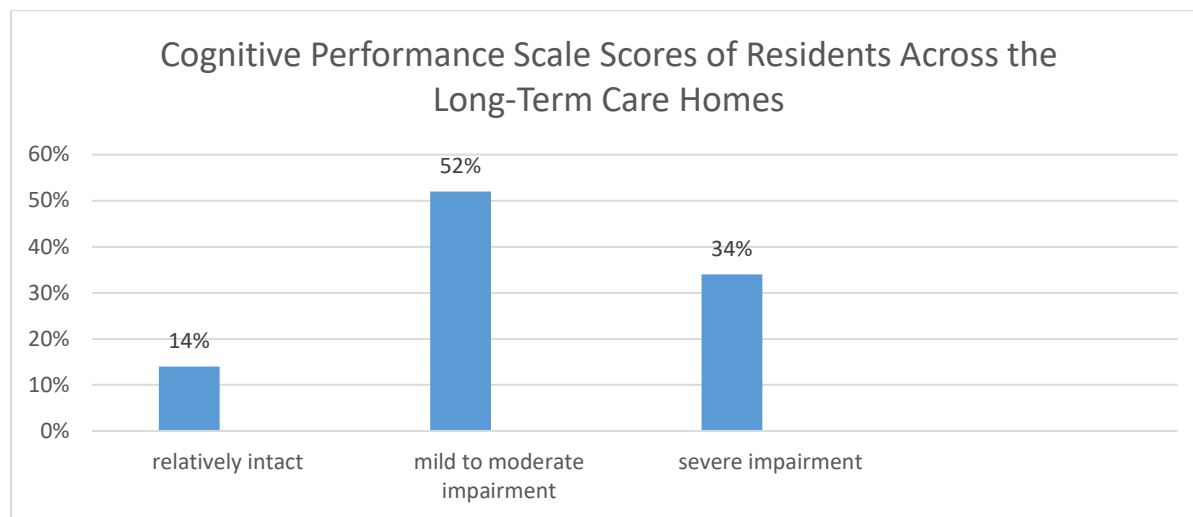
Profile of the Current LTC Resident Population

Niagara Region Seniors Services provided Long-Term Care (LTC) services for 1,525 residents in 2018. The eight LTC homes welcomed 571 new admissions throughout the year and at the end of 2018 there were 1,998 seniors on the waitlist for our homes.

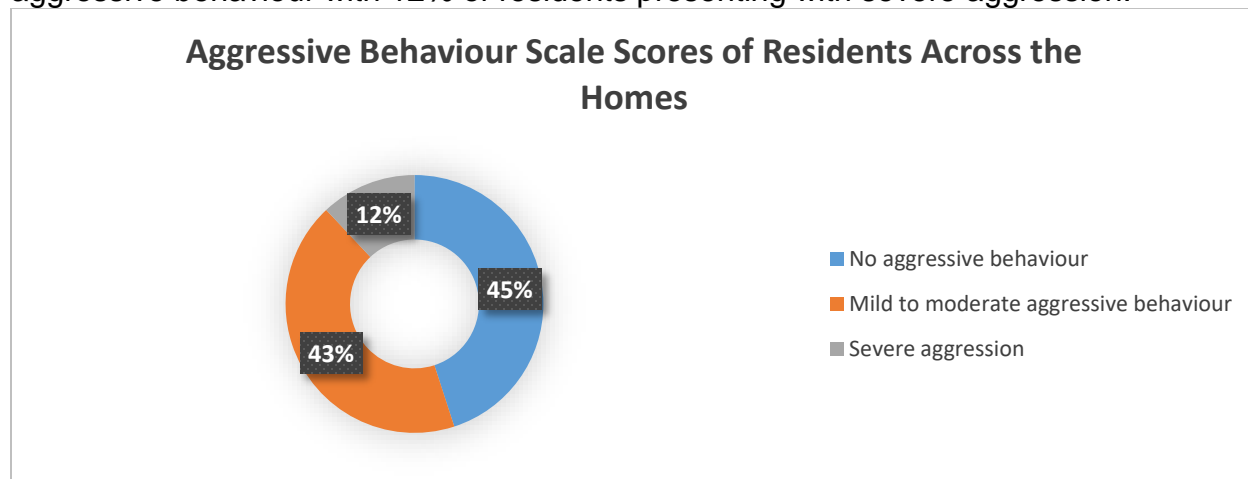
The average age of residents in the LTC homes in 2018 was 84. Many of the residents in the homes are dependent on a wheelchair or walker and require assistance with the activities of daily living (e.g. bathing, dressing, and mealtimes) related to physical functional challenges.

With the continued focus on aging at home, people are able to stay in their homes longer and as a result, residents admitted to Long-Term Care present with more acute needs. Newly admitted residents require more complex care, which may include use of oxygen, tube feeds, intravenous therapy, wound care and end of life needs. The attending physicians across the homes work to stabilize acute medical conditions and multiple co-morbidities (multiple chronic conditions) of residents, while collaborating with the full interdisciplinary team to optimize residents' functional capacity and quality of life.

Many residents of the LTC homes also present with cognitive impairment. The chart below details the Cognitive Performance Scale (CPS) scores of residents across the LTC homes. The CPS combines information on memory impairment, level of consciousness and executive function. As illustrated in the chart below, 86% of residents across the homes have mild to moderate or severe cognitive impairment.



Many residents across the LTC Homes also present with responsive behaviours. The Aggressive Behaviour Scale (ABS) is a measure of aggressive behaviour based on the occurrence of verbal abuse, physical abuse, socially disruptive behaviour and resistance of care. A score of 1 - 4 indicates mild to moderate aggressive behaviour and a score of 5 or more represents the presence of more severe aggression. The following chart illustrates that 55% of residents across the homes present some level of aggressive behaviour with 12% of residents presenting with severe aggression.



Based on their review of LTC in 2018 and anticipated future trends, the Medical Directors made three recommendations in support of continuous improvement.

Recommendation 1:

Continue to focus on staff training and capacity building to ensure residents' increasingly complex needs can be met in the LTC homes, minimizing the need for transfers to hospital.

To address the prevalence of cognitive impairment and responsive behaviours among the residents, Seniors Services staff have completed Gentle Persuasive Approaches (GPA) training, responsive behaviour training and Code White training (violent outburst response plan). In 2019 staff will receive further training in support of providing resident centered, individualized care for residents with cognitive impairment with the introduction of "Positive Approaches to Care" an effective companion training program to GPA training.

To address clinical needs given increasing acuity of residents, registered staff will be focusing on clinical capacity building in 2019 through the introduction of two new learning programs.

- (i) Intravenous Therapy Certification - This training will enhance the scope of practice of our registered staff and avoid resident hospital transfers for infusion of medications.

- (ii) York University Wound Care Certificate Course – This training will support registered staff to develop the necessary competencies to lead home based wound care teams, to effectively optimize use of the wound care app and to manage more complex wounds. Advanced wound care skills will help avoid transfers to hospital for complex wound related complications.

Recommendation 2:

Continue to advocate for enhanced funding to increase Personal Support Worker (PSW) and recreation staffing levels.

The Medical Directors identified a need for increased MOHLTC funding to enhance front-line staffing to support resident care needs. The Medical Directors also noted that additional dedicated recreation staff on each unit would relieve residents of boredom and loneliness. They felt that this would improve the resident experience by keeping them emotionally balanced, physically active and socially engaged.

As reported in COM 07-2019, Seniors Services completed a staffing study to determine optimal staffing levels across the LTC homes. In 2018 the MOHLTC provided an increase to base funding in the Nursing and Personal Care funding envelope which was used to add to PSW staffing levels. The MOHLTC also provided an increase to base funding in the Programs funding envelope which was used to add a four hour recreation shift to all dementia units. These additional four hours will help support care on the unit and help to manage escalating behaviours related to ‘sun-downing’ (a neurological phenomenon associated with increased confusion and restlessness in patients with dementia).

These staffing enhancements, approved through the 2019 budget process have increased the staffing by 0.16 hours/per resident/day, now operating at 3.32 hours/resident/day per day. Seniors Services and AdvantAge Ontario¹ continue to advocate for increasing staffing levels to achieve the target of 4.0 hours/resident/day.

Recommendation 3:

Enhance the level of support offered to families and caregivers related to the transition into LTC and in understanding the progression of dementia.

The Medical Directors identified the need for increased support to families and caregivers who admit their loved one to our homes. Families and caregivers are supporting their loved ones at home longer as part of the Aging at Home strategy, prior to being admitted to LTC. In the community, home care provides core supports to help people live independently in their homes as long as possible. The strategy promotes access to services and seeks to ensure co-ordinated care efforts.

¹ AdvantAge is an association for not-for-profit Long-Term Care homes and services for seniors in Ontario that Niagara Region Seniors Services is a member of.

In 2016, Health Quality Ontario (HQO) published a report called 'The Reality of Caring'. This report collected data from family, friends and neighbours who helped care for people in their homes. The burden and distress was evident and had doubled between 2009 and 2014. This has been recognized by the province and initiatives and supports are being trialed to ease the stress of the unpaid caregivers. The data from HQO showed that, generally, the caregivers are more distressed when they are caring for a cognitively impaired person.

The Medical Directors noted that more support should be provided to family members who have admitted their loved one to our LTC home. The stress these care providers felt at home can carry over to the long-term care experience. The families themselves are more complex. The Medical Directors noted that we are no longer just caring for the resident but the family members and friends as well. Currently across the eight LTC homes we have some social worker supports for families and are exploring options to add additional supports to provide care for burdened and stressed family members.

In summary, it was noted by the Medical Directors that even though there are multiple challenges and financial constraints placed on the home, staff overall provide excellent services across the interdisciplinary team to each resident.

Alternatives Reviewed

Not Applicable.

Relationship to Council Strategic Priorities

Not Applicable.

Other Pertinent Reports

- COM 07-19 Seniors Services Quality Improvement Report, Sept to Dec 2018

Prepared by:

Kim Eros
Associate Director Clinical and Support
Services
Community Services

Recommended by:

Adrienne Jugley, MSW, RSW, CHE
Commissioner
Community Services

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was prepared by Kim Eros, Associate Director, Clinical and Support Services and reviewed by Henri Koning, Director, Seniors Services.

From: Karen Reece <karen@alphaweb.org>
Sent: Wednesday, March 20, 2019 11:21 AM
To: All Health Units <AllHealthUnits@lists.alphaweb.org>
Cc: various recipients
Subject: 2019 alPHa Boards of Health Fitness Challenge

CAUTION: This email originated from outside of the Niagara Region email system. Use caution when clicking links or opening attachments unless you recognize the sender and know the content is safe.

To Boards of Health Chairs please print, post and circulate widely – 2019 alPHa Fitness Challenge

Attention: All Board of Health Members

You might have heard about the alPHa Fitness Challenge for Public Health Units, well, we are pleased to tell you that there is now one for **Boards of Health!**

The challenge to our Board of Health members is to involve the entire Board in a 30-minute walk, wheel, whatever.....just be active for half an hour! Any Board of Health that achieves a 100% group participation will be deemed a winner, any Board of Health that receives 95% or better will also receive an honorable mention.

Remember, the key to completing this challenge successfully is 100 % Board of Health participation.

CORRECTION: Please send us all your photo`s to Loretta Ryan at loretta@alphaweb.org or at Twitter <https://twitter.com/phagencies?lang=en>
Attached are the rules and regulations.

Good luck to everyone, and we'll see you all at the finished line!

Take Care,

Loretta

Loretta Ryan, CAE, RPP
Executive Director
Association of Local Public Health Agencies (alPHa)
2 Carlton Street, Suite 1306
Toronto, ON M5B 1J3
Tel: 416-595-0006 ext. 22
Cell: 647-325-9594
loretta@alphaweb.org
www.alphaweb.org





Association of Local
PUBLIC HEALTH
Agencies

2019 ALPHA FITNESS CHALLENGE FOR BOARD OF HEALTH MEMBERS



alPHA is inviting all Boards of Health to participate in the Fitness Challenge!

The challenge to our Board of Health members is to involve the entire Board in a 30-minute walk, wheel, whatever.....just be active for half an hour!



HERE'S HOW TO PARTICIPATE

READY - Designate someone to co-ordinate and keep count of your participants.

SET - Participate in a minimum of 30 minutes of walking or wheeling during the months of April or May as part of a Board of Health activity. Can't get together? You can still participate and head out on your own! As long as everyone on the Board participates, you are a winner!

GO - Have your designated co-ordinator complete the results form and email it back to us at info@alphaweb.org.

EASY TIPS TO GET ACTIVE!

Before or After Your Board of Health Meeting - Go out for a 30-minute walk before or after your Board meeting in April or May.

At Lunch - Many of us have sedentary jobs, why not brainstorm project ideas with fellow Board members during a lunchtime walk or wheel?

After work or on the Weekend - Not enough time before or after your Board meeting and lunch time is too busy? Set up another date and time to meet in April or May and go for a walk or wheel!

Completed forms must be received by 12:00 noon on Friday May 31, 2019; send them to info@alphaweb.org

30-minute walk...wheel...whatever!

HERE ARE THE RULES

Boards of Health must complete the attached alPHA Fitness Challenge Form. All Board of Health with 100% group participation will be considered winners

CONTEST RULES AND GUIDELINES

1 - Only members of Boards of Health are eligible.

2 - The 30-minute walk or wheel can be completed anytime during April or May and it is encouraged that this takes place before or after the May meeting. If no meeting is scheduled then the Board members are encouraged to get together and walk or wheel at another time.

3 - Board members can complete their 30-minute walk or wheel individually, however, it is encouraged that this to be a group activity.

4 - Any 30-minute walk or wheel will be considered as an eligible activity.

5 - The winning Board of Health(s) will be recognized at the Conference in June.

AND THE WINNER IS ..

The results will be broadcast on the allhealthunits listserv in June and via alPHA's Twitter account: @PHAgencies. The winning Board of Health(s) will also receive an award at the 2019 alPHA Annual General Membership meeting in June.

2019 BOARD OF HEALTH aPHa FITNESS CHALLENGE

Deadline to submit: Friday, May 31, 2019

Email completed form to: info@alphaweb.org

Please fill in the fields below:

BOARD OF HEALTH: _____

COORDINATOR(S): _____

COORDINATOR'S EMAIL: _____

Number of Members on the Board of Health (incl. Chair): _____

Number of BOH members participating in at least 30 minutes of physical activity: _____

BOH member participation rate: _____

If BOH members participated in a **group activity**, please include a short description of the activity:

If BOH members participated as individuals, please list the activities they participated in:

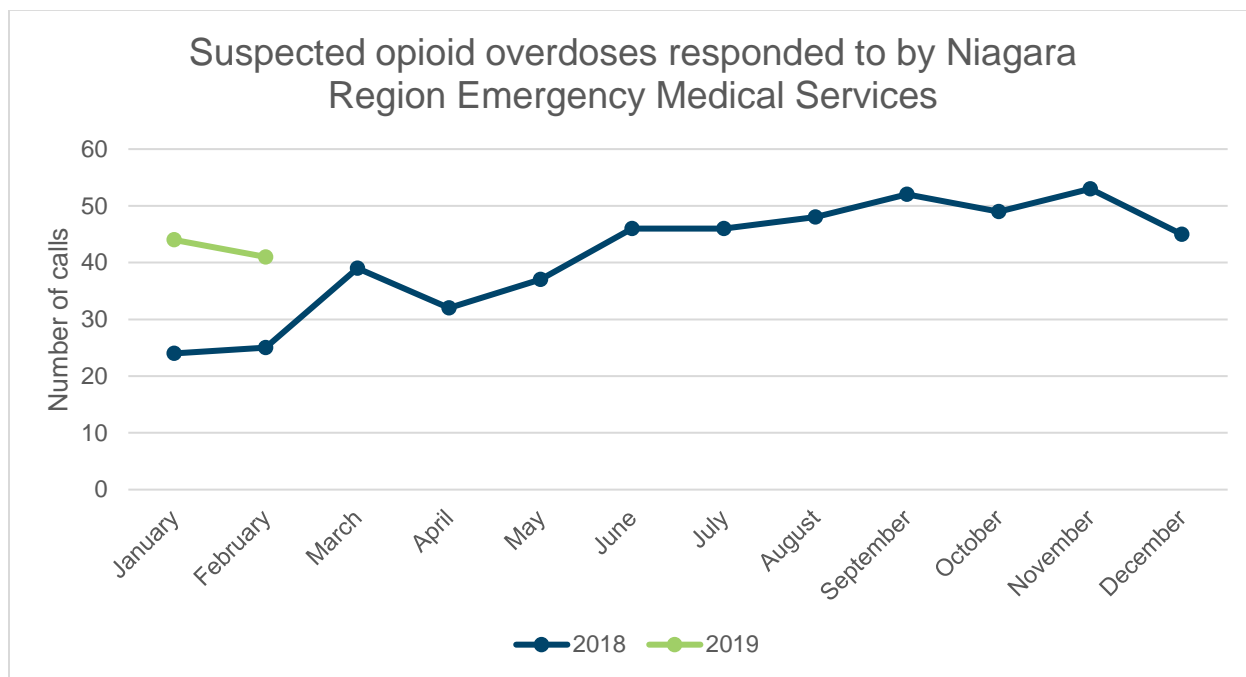
MEMORANDUM

CWCD 131-2019

Subject: Opioid Work Update
Date: April 5, 2019
To: Board of Health
From: Dr. Andrea Feller, Associate Medical Officer of Health

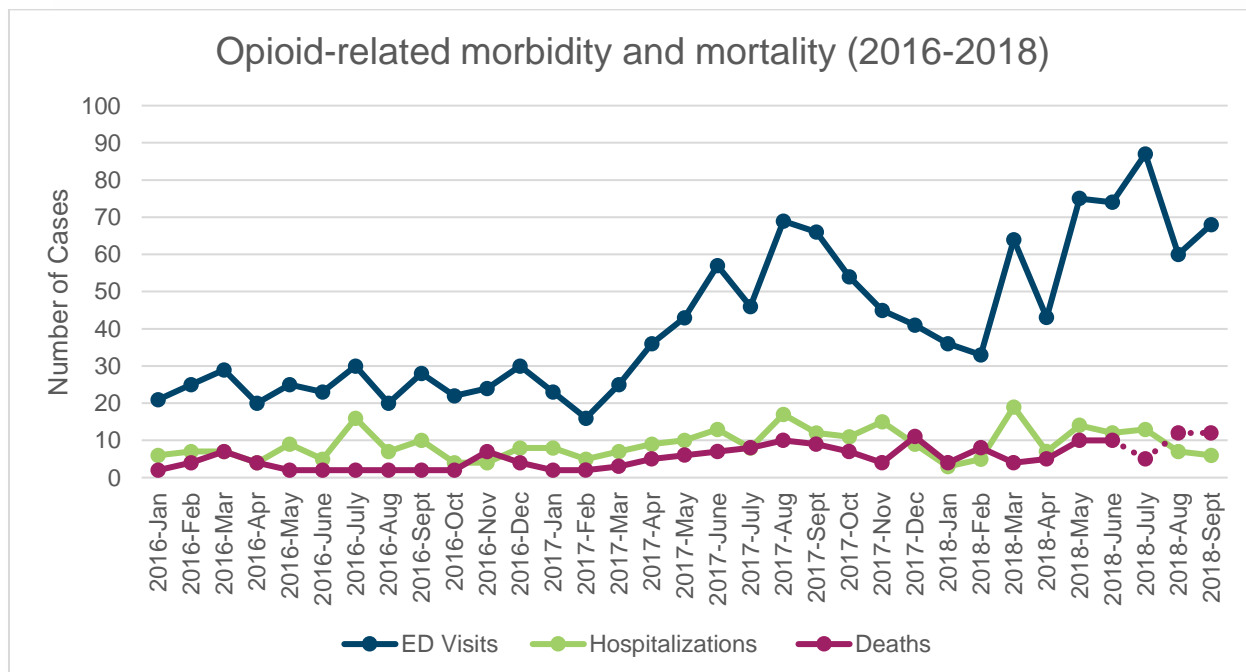
In our goal to continue to keep you updated around opioids, please see the following.

1. Positive Living Niagara and the community received the required federal exemption for supervised injection services. On March 29, approval was granted for funding a Consumption and Treatment Services (CTS) site for one year. Further details about the location and model will be released by Positive Living Niagara and Opioid Prevention and Education Network of Niagara (OPENN) in due course.
2. Naloxone has been distributed (over 2550 kits) to 25 key agencies who are actively distributing within the critical social and close peer network, in addition to appropriate patient provisions through St. John Ambulances, Niagara Health sites, and EMS. Naloxone training for Niagara Regional Police Service is almost complete. All agencies that have chosen to be a public access point are listed at: <https://www.ontario.ca/page/where-get-free-naloxone-kit>
3. OPENN updates: An advisory system on toxic drug/adverse reaction sharing is under development. Also, the Substance Use Strategy for Niagara, currently focused on prevention, is on track and in the lived experience consultation phase. Good progress is being made around capturing data that is more narrative in nature, as well as OPENN communications to share updates and additional education and information on social media.
4. The website is updated as data becomes available. These updates are available through PH&ES site (in addition to elsewhere on the Region's site). https://www.niagararegion.ca/living/health_wellness/alc-sub-abuse/drugs/overdose-prevention.aspx
5. For this report, we have included some **preliminary** data (in broken lines) in addition to the data found on the website. A summary of opioid-related population health outcome and naloxone distribution data available to date follows. As expected, 2018 trends were higher than 2017.



Data source: EMS Edge [2019].

- In 2018, there were 496 suspected opioid overdoses that were responded to by EMS. This was an average of 41 calls per month
- In the first two months of 2019, there have been 85 suspected opioid overdoses that were responded to by EMS. This is an average of 42.5 calls per month



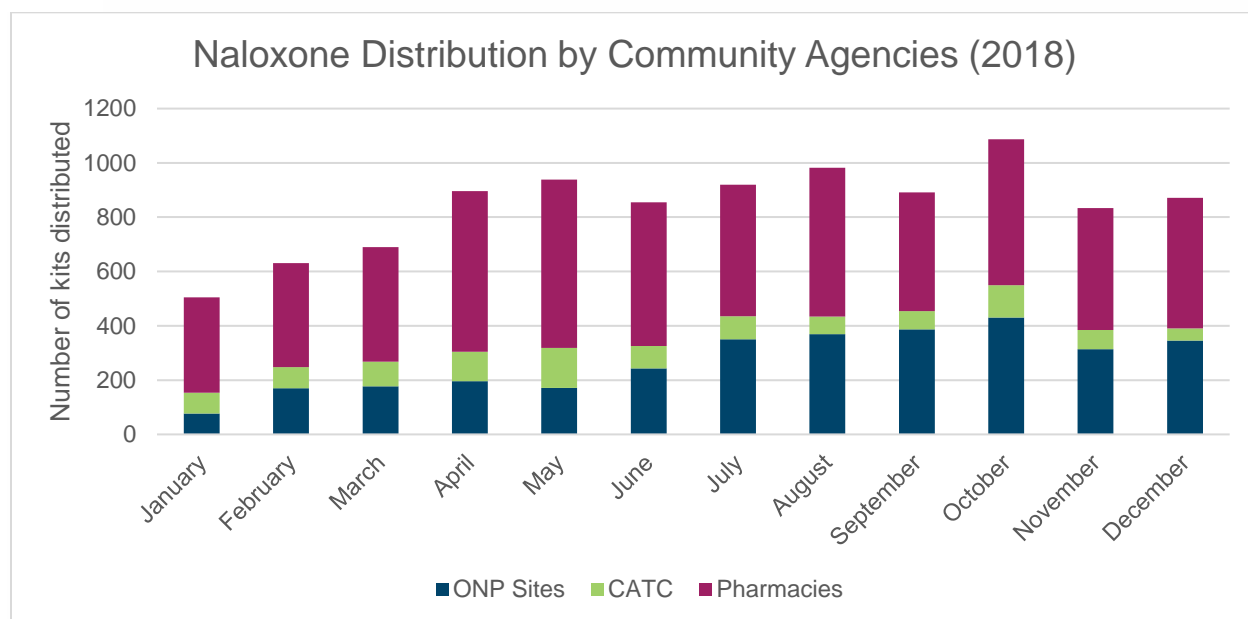
Data source: National Ambulatory Care Reporting System, 2016-2018; Discharge Abstract Database, 2016-2018; Office of the Chief Coroner of Ontario, 2016-2018.

Emergency Department Visits and Hospitalizations

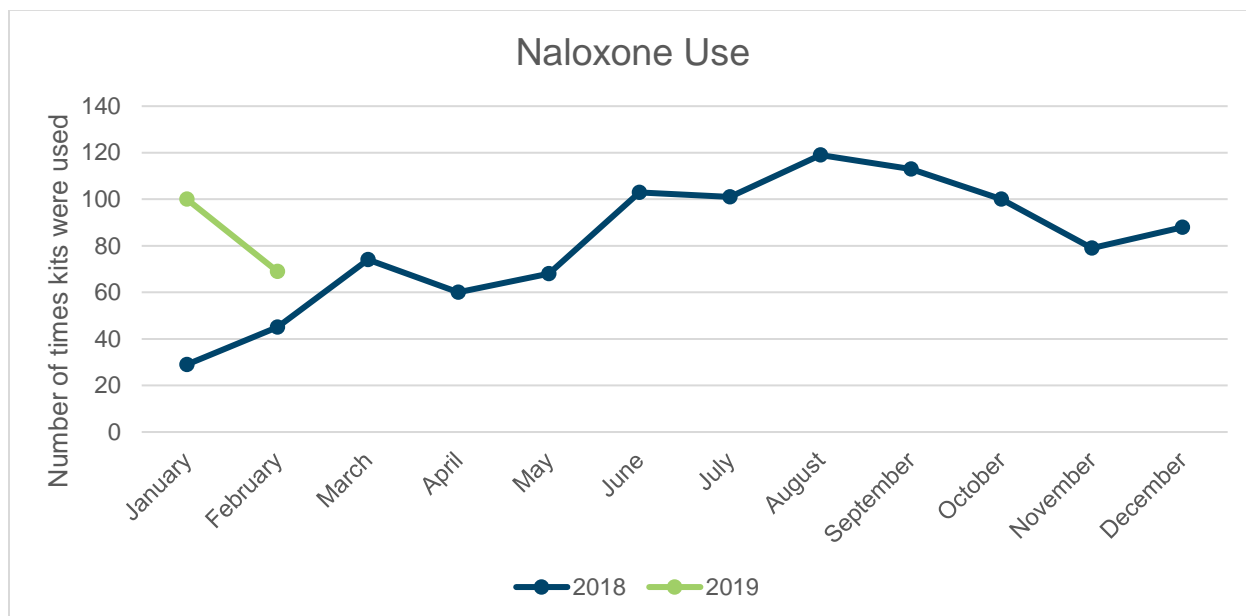
- In 2016, there were a total of 297 opioid poisoning emergency department (ED) visits, and 87 hospitalizations. This was an average of 25 ED visits per month and 7 hospitalizations per month
- In 2017, there was a total of 521 opioid poisoning ED visits and 124 hospitalizations. This was an average of 43 ED visits per month and 10 hospitalizations per month
- Up to the end of September 2018, there have been 540 opioid poisoning ED visits and 86 hospitalizations. This is an average of 60 ED visits per month and 10 hospitalizations per month

Deaths

- In 2016, there were 40 opioid overdose deaths. This was an average of 3 deaths per month
- In 2017, there were 74 opioid overdose deaths. This was an average of 5 deaths per month
- In the first half of 2018, there have been 41 opioid overdose deaths. This is an average of 7 deaths per month



Data source: Niagara Region Naloxone Distribution and Use [2018].



Data source: Niagara Region Naloxone Distribution and Use [2018].

- In 2018, there were 10,000 naloxone kits distributed by pharmacies, Ontario Naloxone Program sites, and the Canadian Addiction Treatment Centres.
 - In January 2019, 892 kits had been distributed
- In 2018, naloxone kits were reported to be used 979 times
 - In January and February 2019, 169 kits were reported to be used

We will continue to keep you updated. Other pertinent correspondence is listed below:

CWCD 440-2018

Respectfully submitted and signed by

Andrea Feller, MD, MS, FAAP, FACPM
Associate Medical Officer of Health

Minute Item No. 5.1
CSD 16-2019
2019 Property Tax Policy, Ratios and Rates

That Report CSD 16-2019, dated April 17, 2019, respecting 2019 Property Tax Policy, Ratios and Rates, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Regional Council **APPROVE** the following tax ratios and sub-class reductions for the 2019 taxation year:

<u>Property Classification</u>	<u>Tax Ratio</u>	<u>Sub-Class Reduction</u>
Residential	1.000000	
New Multi-Residential	1.000000	
Multi-Residential	1.970000	
Commercial	1.734900	
Commercial – Excess Land	1.734900	30%
Commercial – Vacant Land	1.734900	30%
Industrial	2.630000	
Industrial – Excess Land	2.630000	30%
Industrial – Vacant Land	2.630000	30%
Pipeline	1.702100	
Farmland	0.250000	
Managed Forest	0.250000	
Farmland Awaiting Development 1	1.000000	25%
Farmland Awaiting Development 2	Class Ratio	
Landfill Sites	2.940261	

2. That by having no properties eligible for capping in the industrial class, Regional Council **OPT OUT** of the capping program for the industrial tax class for the 2019 and subsequent taxation years;
3. That the 2019 tax capping program for the commercial class reflecting the following criteria **BE APPROVED**:
 - a. An annual cap **BE SET** at the greater of:
 - i. An amount representing an increase of 10% of the previous year's annualized tax, or
 - ii. An amount representing an increase of 10% of the previous year's Current Value Assessment (CVA) tax;
 - b. That, following the application of the capping program, all increasing properties within \$500 threshold and decreasing properties within \$50 threshold of the CVA taxes **BE MOVED** directly to CVA taxation;
 - c. Properties at CVA tax in 2018 **BE EXCLUDED** from the capping program; and

- d. Properties that would cross over CVA tax in 2019 **BE EXCLUDED** from the capping program;
4. That the phase-out of the capping program over four years for the Commercial property class with 2019 being year three of the four years **BE ADOPTED**;
5. That the option to limit capping protection only to reassessment-related changes prior to 2019 **BE ADOPTED**;
6. That the 2019 capping program **BE FUNDED** by claw back from within respective classes pursuant to section 330 of the Municipal Act;
7. That the Region **BE DIRECTED** to act as a banker, under section 330(6) of the Municipal Act for the 2019 municipal tax adjustments;
8. That the necessary by-laws **BE PREPARED** and **PRESENTED** to Council for consideration and **BE CIRCULATED** to the Councils of the local area municipalities for information; and
9. That this report **BE CIRCULATED** to the Councils of the local area municipalities for information.

Minute Item No. 5.2
CSD 20-2019
Asset Management Policy

That Report CSD 20-2019, dated April 17, 2019, respecting Asset Management Policy **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That the Asset Management Policy, Appendix 2 of Report CSD 20-2019, **BE APPROVED**.

Minute Item No. 5.3
CSD 28-2019
Insurance and Risk Management Services Contract Extension for November 1, 2019 – November 1, 2020

That Report CSD 28-2019, dated April 17, 2019, respecting Insurance and Risk Management Services Contract Extension for November 1, 2019 – November 1, 2020, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Staff **BE AUTHORIZED** to exercise the option in favour of The Regional Municipality of Niagara ("Niagara Region") to extend the insurance and risk management services contract with Jardine Lloyd Thompson Canada Inc. ("JLT") on the same terms and conditions for an additional term of one year for the 2019-2020 policy term based upon an estimated annual cost of \$915,426 (including 8% PST) subject to renewal premium increases due to additional insured property and fleet values.

Minute Item No. 5.4

CSD 29-2019

Bill 142 – Construction Lien Amendment Act, 2017

That Report CSD 29-2019, dated April 17, 2019, respecting Bill 142 – *Construction Lien Amendment Act, 2017*, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Regional Council **ENDORSE** the recommendations made by the Association of Municipalities Ontario (AMO) to the Ministry of the Attorney General to consider the following additional changes to the recently amended Construction Act:
 - Owners should be provided more than 14 days to publish a notice of non-payment to ensure that due diligence is completed before payment of a proper invoice is required (e.g. 21 business days);
 - The time period between December 24th to January 2nd of each calendar year should be excluded from the calculation of time with respect to Prompt Payment and Adjudication;
 - The date for implementing the Prompt Payment and Adjudication regimes should be postponed from October 1, 2019 to one year following the establishment of the Authorized Nominating Authority (ANA); and
 - That the Ministry create and communicate practice guides, interpretation bulletins, and webinars in alignment with Recommendations 97 & 98 of the Expert Panel's Report to educate owners, contractors, and subcontractors of the new regimes;
2. That the Regional Chair **BE DIRECTED** to send a letter to the Ministry of the Attorney General to consider the recommendations made by AMO respecting the changes to the Construction Act; and
3. That Report CSD 29-2019 **BE CIRCULATED** to the local area municipalities

Minute Item No. 9.1

Confidential Report CSD 30-2019

A Matter Respecting Litigation and A Matter of Advice that is Subject to Solicitor-Client privilege under s. 239 (2) of the Municipal Act, 2001 – Kingdom Construction Limited re Niagara Falls Water Treatment Plant

That Confidential Report CSD 30-2019, dated April 17, 2019, respecting A Matter Respecting Litigation and A Matter of Advice that is Subject to Solicitor-Client privilege under s. 239 (2) of the Municipal Act, 2001 – Kingdom Construction Limited re Niagara Falls Water Treatment Plant, **BE RECEIVED** and the recommendations contained therein **BE APPROVED**

**THE REGIONAL MUNICIPALITY OF NIAGARA
CORPORATE SERVICES COMMITTEE
OPEN SESSION**

**CSC 04-2019
Wednesday, April 17, 2019
Council Chamber
Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON**

Committee: Bradley (Regional Chair), Butters, Campion, Diodati, Edgar, Fertich, Gale, Ip, Redekop, Rigby, Whalen (Committee Vice-Chair)

Absent/Regrets: Easton, Foster (Committee Chair), Heit

Staff: H. Chamberlain, Director, Financial Management & Planning/Deputy Treasurer, R. Fleming, Senior Tax and Revenue Analyst, D. Gibbs, Director, Legal & Court Services, T. Harrison, Commissioner/Treasurer, Enterprise Resource Management Services, B. Menage, Director, Procurement & Strategic Acquisitions, M. Murphy, Associate Director, Budget Planning & Strategy, A.-M. Norio, Regional Clerk, D. Pasto, Risk Management Program Manager, M. Trennum, Deputy Regional Clerk, R. Tripp, Acting Chief Administrative Officer

1. CALL TO ORDER

Committee Vice-Chair Whalen called the meeting to order at 9:41 a.m.

2. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

3. PRESENTATIONS

There were no presentations.

4. DELEGATIONS

There were no delegations.

5. **ITEMS FOR CONSIDERATION**

5.1 **CSD 16-2019**

2019 Property Tax Policy, Ratios and Rates

Rob Fleming, Senior Tax & Revenue Analyst provided information respecting 2019 Property Tax Policy, Ratios and Rates. Topics of the presentation included:

- Tax Policy Background, Responsibility & Definitions
- Assessment Growth versus Reassessment Impacts
- Tax Policy Background
- 2019 Recommended Tax Policy
- 2019 Provincial Policy
- Next Steps

Moved by Councillor Diodati
Seconded by Councillor Gale

That Report CSD 16-2019, dated April 17, 2019, respecting 2019 Property Tax Policy, Ratios and Rates, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Regional Council **APPROVE** the following tax ratios and sub-class reductions for the 2019 taxation year:

<u>Property Classification</u>	<u>Tax Ratio</u>	<u>Sub-Class Reduction</u>
Residential	1.000000	
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Multi-Residential	1.970000	
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Industrial – Vacant Land	2.630000	30%
Pipeline	1.702100	
Farmland	0.250000	
Managed Forest	0.250000	
Farmland Awaiting Development 1	1.000000	25%
Farmland Awaiting Development 2	Class Ratio	
Landfill Sites	2.940261	

2. That by having no properties eligible for capping in the industrial class, Regional Council **OPT OUT** of the capping program for the industrial tax class for the 2019 and subsequent taxation years;
3. That the 2019 tax capping program for the commercial class reflecting the following criteria **BE APPROVED**:
 1. An annual cap **BE SET** at the greater of:
 2. An amount representing an increase of 10% of the previous year's annualized tax, or
 3. An amount representing an increase of 10% of the previous year's Current Value Assessment (CVA) tax;
 2. That, following the application of the capping program, all increasing properties within \$500 threshold and decreasing properties within \$50 threshold of the CVA taxes **BE MOVED** directly to CVA taxation;
 3. Properties at CVA tax in 2018 **BE EXCLUDED** from the capping program; and
 4. Properties that would cross over CVA tax in 2019 **BE EXCLUDED** from the capping program;
4. That the phase-out of the capping program over four years for the Commercial property class with 2019 being year three of the four years **BE ADOPTED**;
5. That the 2019 capping program **BE FUNDED** by claw back from within respective classes pursuant to section 330 of the *Municipal Act*;
6. That the Region **BE DIRECTED** to act as a banker, under section 330(6) of the *Municipal Act* for the 2019 municipal tax adjustments;
7. That the necessary by-laws **BE PREPARED** and **PRESENTED** to Council for consideration and **CIRCULATED** to the Councils of the local area municipalities for information; and
8. That this report **BE CIRCULATED** to the Councils of the local area municipalities for information.

Carried

Councillor Information Request(s):

Provide information respecting the effect that lowering the industrial tax ratio would have on the residential tax ratios. Councillor Rigby.

Provide information respecting the alignment of Niagara Region's tax policy respecting commercial and industrial vacancy rebate and subclass reduction phase-out with the Province of Ontario's policy. Councillor Diodati.

5.2 CSD 20-2019

Asset Management Policy

Moved by Councillor Diodati

Seconded by Councillor Gale

That Report CSD 20-2019, dated April 17, 2019, respecting Asset Management Policy **BE RECEIVED** and the following recommendation **BE APPROVED**:

1. That the Asset Management Policy, Appendix 2 of Report CSD 20-2019, **BE APPROVED**.

Carried

5.3 CSD 28-2019

Insurance and Risk Management Services Contract Extension for November 1, 2019 – November 1, 2020

Moved by Councillor Campion

Seconded by Councillor Rigby

That Report CSD 28-2019, dated April 17, 2019, respecting Insurance and Risk Management Services Contract Extension for November 1, 2019 – November 1, 2020, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That staff **BE AUTHORIZED** to exercise the option in favour of The Regional Municipality of Niagara ("Niagara Region") to extend the insurance and risk management services contract with Jardine Lloyd Thompson Canada Inc. ("JLT") on the same terms and conditions for an additional term of one year for the 2019-2020 policy term based upon an estimated annual cost of \$915,426 (including 8% PST) subject to renewal premium increases due to additional insured property and fleet values.

Carried

5.4 CSD 29-2019

Bill 142 – *Construction Lien Amendment Act, 2017*

Moved by Councillor Butters

Seconded by Councillor Ip

1. That Regional Council **ENDORSE** the recommendations made by the Association of Municipalities Ontario (AMO) to the Ministry of the Attorney General to consider the following additional changes to the recently amended *Construction Act*:
 - Owners should be provided more than 14 days to publish a notice of non-payment to ensure that due diligence is completed before payment of a proper invoice is required (e.g. 21 business days);
 - The time period between December 24th to January 2nd of each calendar year should be excluded from the calculation of time with respect to Prompt Payment and Adjudication;
 - The date for implementing the Prompt Payment and Adjudication regimes should be postponed from October 1, 2019 to one year following the establishment of the Authorized Nominating Authority (ANA); and
 - That the Ministry create and communicate practice guides, interpretation bulletins, and webinars in alignment with Recommendations 97 & 98 of the Expert Panel's Report to educate owners, contractors, and subcontractors of the new regimes;
2. That the Regional Chair **BE DIRECTED** to send a letter to the Ministry of the Attorney General to consider the recommendations made by AMO respecting the changes to the *Construction Act*; and
3. That Report CSD 29-2019 **BE CIRCULATED** to the local area municipalities.

Carried

6. **CONSENT ITEMS FOR INFORMATION**

There were no consent items for information.

7. OTHER BUSINESS

7.1 Questions and Debate During Presentations

Committee members requested staff provide clarity with respect to when discussion following a presentation to Committee is limited to questions and the Committee Chair's responsibility to manage questions to presenters. Staff advised that this matter will be brought to the Procedural By-law Review Committee for consideration.

7.2 Confidentiality of Closed Session

Committee members raised concerns respecting the unauthorized release of confidential information from closed session meetings. Staff advised that they take the unauthorized release of confidential information very seriously and reminded Committee of the letter from external legal counsel that was circulated at the Committee of the Whole meeting held on April 11, 2019, which reminded Councillors of their responsibilities under the Code of Conduct with respect to confidential information. Staff advised that the Integrity Commissioner would be invited to present at a future Council meeting on this matter. The Regional Chair further advised that he would reiterate to Council their obligations under the Code of Conduct with respect to confidential information.

8. CLOSED SESSION

Committee did not resolve into closed session.

9. BUSINESS ARISING FROM CLOSED SESSION ITEMS

9.1 Confidential Report CSD 30-2019

A Matter Respecting Litigation and A Matter of Advice that is Subject to Solicitor-Client privilege under s. 239 (2) of the *Municipal Act, 2001* – Kingdom Construction Limited re Niagara Falls Water Treatment Plant

Moved by Councillor Edgar
Seconded by Councillor Fertich

That Confidential Report CSD 30-2019, dated April 17, 2019, respecting A Matter Respecting Litigation and A Matter of Advice that is Subject to Solicitor-Client privilege under s. 239 (2) of the *Municipal Act, 2001* – Kingdom Construction Limited re Niagara Falls Water Treatment Plant, **BE RECEIVED** and the recommendations contained therein **BE APPROVED**.

Carried

10. NEXT MEETING

The next meeting will be held on Wednesday, May 8, 2019 at 9:30 a.m. in the Council Chamber, Regional Headquarters.

11. ADJOURNMENT

There being no further business, the meeting adjourned at 10:57 a.m.

Councillor Whalen
Committee Vice-Chair

Matthew Trennum
Deputy Regional Clerk

Ann-Marie Norio
Regional Clerk

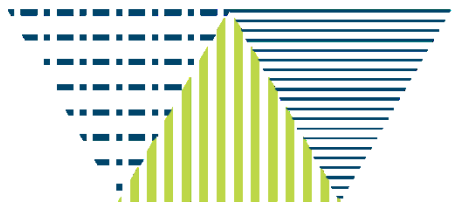
2019

Property Tax Policy, Ratios & Rates

Corporate Services Committee
April 17, 2019

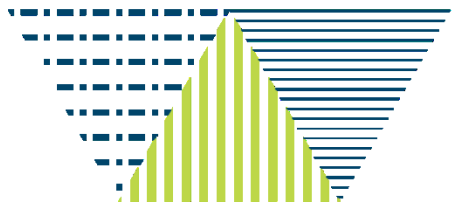
Agenda

- Tax Policy Background, Responsibility & Definition
- Assessment Growth versus Reassessment Impacts
- Tax Policy Background
- 2019 Recommended Tax Policy
- 2019 Provincial Policy
- Next Steps



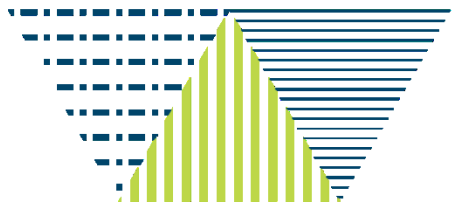
Tax Policy Background & Responsibility

- The Municipal Act requires that the Region pass a by-law in each year to establish tax ratios which will create the tax rates to raise the approved levy for the upper-tier and lower-tier municipalities.
- Regional Council is also responsible for many other tax policy decisions that must be established annually including:
 - Setting parameters for business tax capping
 - Optimal tax structure and subclass discounts
 - Other rebate, deferral and vacancy programs
- Tax Policy: [Relationship between property taxes and assessment](#)
- Tax Policy recommendations have been made in collaboration with Area Treasurers



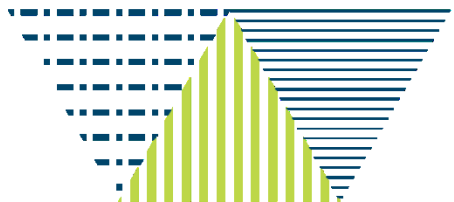
Property Tax Class Definitions

- Multi-Residential
 - Lands used for residential purposes that have 7 or more self contained units, (excludes condominiums which are in Residential Class)
- New Multi-Residential
 - Optional class adopted for the 2004 and subsequent tax years for new construction that would otherwise be classified as multi-residential (use residential tax ratio and rate). Became mandatory in 2017.



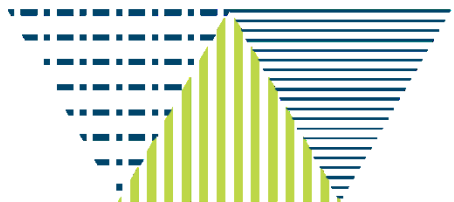
Property Tax Class Definitions

- Commercial
 - Properties that are primarily used for commercial purposes including retail, food service, office buildings.
- Industrial
 - Land and buildings used in connection with manufacturing, producing or processing.

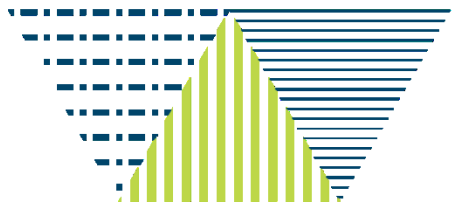


Select Property Tax Policy Definitions

- Excess Land
 - Portion of a parcel of land that has not been developed and is in excess of requirements for existing development elsewhere on the parcel
- Vacant Land
 - The land has no present use and no buildings or structures located on it (taxed based on applicable zoning)



Assessment Growth versus Reassessment Impacts



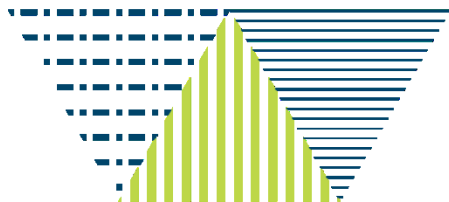
2018 Annualized Revenue Growth by Property Class (Additional Taxation Revenue)

- As presented with 2019 Operating Budget, taxable growth dollars resulted in an additional \$5.7 M or 1.65% in 2018
- Previous year levy plus growth represents starting point for 2019 tax policy analysis

Realty Tax Class	2018 Regional General Levy		Revenue Growth	
	As Returned	As Revised	\$	%
Taxable				
Residential	\$250,722,218	\$256,369,618	\$5,647,400	2.25%
Farm	\$2,832,219	\$2,801,577	-\$30,642	-1.08%
Managed Forest	\$16,253	\$18,205	\$1,952	12.01%
New Multi-Residential	\$766,871	\$780,797	\$13,926	1.82%
Multi-Residential	\$14,913,471	\$14,547,107	-\$366,364	-2.46%
Commercial	\$63,691,226	\$64,130,454	\$439,228	0.69%
Industrial	\$11,497,293	\$11,482,587	-\$14,706	-0.13%
Landfill	\$57,780	\$57,780	\$0	0.00%
Pipeline	\$2,250,941	\$2,265,299	\$14,358	0.64%
Sub-Total Taxable	\$346,748,272	\$352,453,424	\$5,705,152	1.65%

2018 Taxable
Growth %

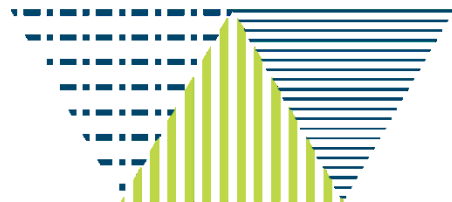
2018
Approved Levy



2018 Annualized Revenue Growth by Area Municipality (Additional Taxation Revenue)

- In year growth varies between municipalities ranging from 0.34% to 4.29%

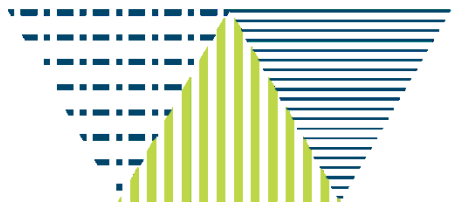
Local Municipality	2018 Regional General Levy		Revenue Growth	
	As Returned	As Revised	\$	%
Fort Erie	\$21,925,108	\$22,428,328	\$503,220	2.30%
Grimsby	\$25,095,975	\$25,883,857	\$787,882	3.14%
Lincoln	\$20,175,612	\$20,443,857	\$268,245	1.33%
Niagara Falls	\$72,858,490	\$74,209,801	\$1,351,311	1.85%
Niagara-on-the-Lake	\$29,461,668	\$30,082,399	\$620,731	2.11%
Pelham	\$14,413,733	\$14,718,064	\$304,331	2.11%
Port Colborne	\$11,512,654	\$11,599,092	\$86,438	0.75%
St. Catharines	\$93,484,979	\$93,802,595	\$317,616	0.34%
Thorold	\$13,560,338	\$14,142,691	\$582,353	4.29%
Wainfleet	\$5,203,681	\$5,281,328	\$77,647	1.49%
Welland	\$28,515,782	\$29,032,299	\$516,517	1.81%
West Lincoln	\$10,540,256	\$10,829,113	\$288,857	2.74%
Niagara Region	\$346,748,276	\$352,453,424	\$5,705,152	1.65%



Reassessment Related Tax Impacts (Tax Class Redistribution)

- CVA reflect current market conditions with an effective date of Jan. 1, 2016 (no physical property change)
- MPAC reassesses all properties every 4 years
- Any CVA increases are phased-in over 4 years and any CVA decreases are implemented in the first year of the assessment cycle
- Phase-in related impacts are 4.05% and vary between property class

Realty Tax Class	Phase Adjusted CVA		Change in Phased CVA	
	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	45,240,747,203	46,877,880,220	1,637,133,017	3.62%
Farm	1,976,142,587	2,199,003,701	222,861,114	11.28%
Managed Forest	12,840,739	13,907,719	1,066,980	8.31%
New Multi-Residential	137,687,680	144,085,061	6,397,381	4.65%
Multi-Residential	1,302,167,148	1,346,916,747	44,749,599	3.44%
Commercial	6,623,548,330	6,954,686,379	331,138,049	5.00%
Industrial	808,952,273	839,898,339	30,946,066	3.83%
Landfill	3,465,350	3,536,625	71,275	2.06%
Pipeline	234,691,343	240,756,173	6,064,830	2.58%
Sub-Total Taxable	56,340,242,653	58,620,670,964	2,280,428,311	4.05%

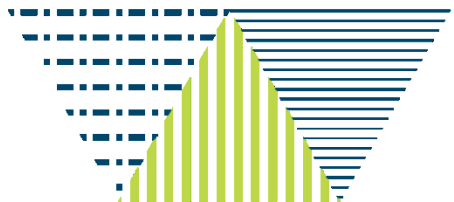


Reassessment Related Impacts (Tax Class Redistribution)

- Varying phase-in changes between classes results in a redistribution of taxes
- This redistribution of taxes by class does not effect the total levy amount
- Residential class will be a shift away in 2019 compared to 2018 year-end of \$726,422 or 0.28%

Realty Tax Class	Regional General Levy		Inter-Class Shifts	
	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$256,369,618	\$255,643,196	-\$726,422	-0.28%
Farm	\$2,801,577	\$3,000,078	\$198,501	7.09%
Managed Forest	\$18,205	\$18,975	\$770	4.23%
New Multi-Residential	\$780,797	\$786,297	\$5,500	0.70%
Multi-Residential	\$14,547,107	\$14,480,189	-\$66,918	-0.46%
Commercial	\$64,130,454	\$64,796,932	\$666,478	1.04%
Industrial	\$11,482,587	\$11,434,577	-\$48,010	-0.42%
Landfill	\$57,780	\$56,746	-\$1,034	-1.79%
Pipeline	\$2,265,299	\$2,236,301	-\$28,998	-1.28%
Sub-Total Taxable	\$352,453,424	\$352,453,291	-\$133	0.00%

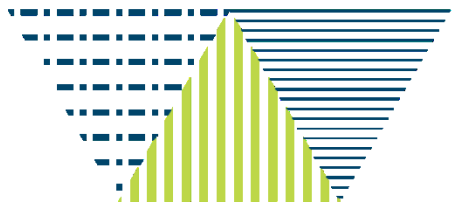
2019 Starting
Levy (after
growth)



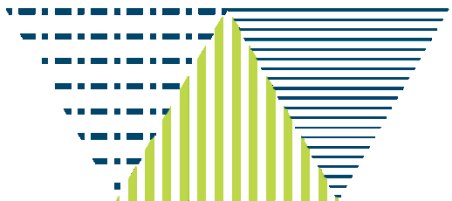
Year-Over-Year Upper-Tier Levy Shifts

- Varying phase-in changes between classes results in shifts between municipalities
- Impacts of varying assessment phase-in between municipalities results in shifts ranging from -1.58% to 2.05%
- In aggregate these changes are 0%

Local Municipality	Rate of Phase-In Change	Inter-Municipal Shifts	
		\$	%
Fort Erie	2.33%	-\$355,349	-1.58%
Port Colborne	2.87%	-\$114,235	-0.98%
Welland	2.93%	-\$273,483	-0.94%
Thorold	3.03%	-\$123,951	-0.88%
Pelham	3.42%	-\$106,828	-0.73%
St. Catharines	3.51%	-\$245,940	-0.26%
Niagara Region	4.05%	-\$133	0.00%
Niagara Falls	4.13%	\$160,580	0.22%
Niagara-on-the-Lake	5.01%	\$230,818	0.77%
Lincoln	5.29%	\$147,570	0.72%
Wainfleet	5.56%	\$28,033	0.53%
Grimsby	5.98%	\$530,219	2.05%
West Lincoln	6.52%	\$122,433	1.13%



Tax Policy Background



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Property Tax Policy, Ratios & Rates

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Tax Burden – BMA Study Averages

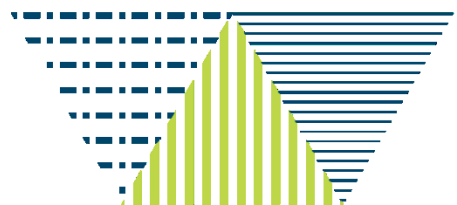
- BMA combines Region, LAM and Education Rates and compares against 108 Ontario Municipalities
- Residential – All property types above BMA study average
- Commercial – Hotel, Shopping above; Office, Motels below
- Multi-Res – Mid/High Rises at par; Walk-up above

Property Class	Property Type	Comparison Metric	Niagara Average* (\$)	Study Average (\$)	Variance		Comparison to Study
					\$	%	
Residential	Bungalow	Tax/Unit	3,466	3,397	69	2.03%	Above
	2 Storey	Tax/Unit	4,656	4,524	132	2.92%	Above
	Executive	Tax/Unit	6,296	6,286	10	0.16%	Above
Multi-Res	Walk-Up	Tax/Unit	1,577	1,382	195	14.11%	Above
	Mid/High-Rise	Tax/Unit	1,716	1,715	1	0.06%	Par
Commercial	Office Buildings***	Tax/ Sq. Ft.	2.77	3.04	(0.27)	-8.88%	Below
	Shopping	Tax/ Sq. Ft.	3.75	2.63	1.12	42.59%	Above
	Hotels**	Tax/Unit	1,844	1,602	242	15.11%	Above
	Motels	Tax/Unit	1,084	1,240	(156)	-12.58%	Below
Industrial	Industrial Vacant Land	Tax/Acre	3,118	3,673	(555)	-15.11%	Below
	Standard Industrial	Tax/ Sq. Ft.	1.82	1.67	0.15	8.98%	Above
	Large Industrial***	Tax/ Sq. Ft.	0.87	1.11	(0.24)	-21.62%	Below

*Calculated using a simple average of all LAMs.

**Classified to be in the high range.

***Classified to be in the low range.

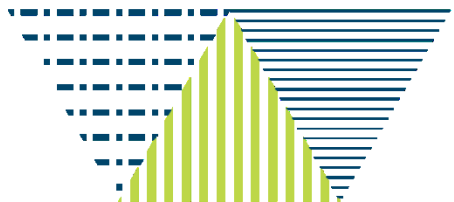


Tax Burden – BMA Study Averages

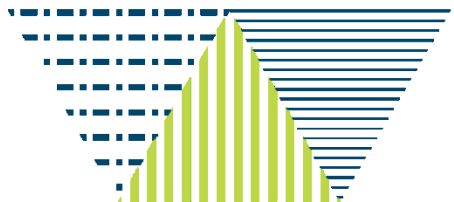
- Niagara weighted average residential property tax burden greater than BMA survey average
- Average property tax per unit is lower than average
- However, offset by lower than average household income

	Niagara Average*	Study Average	Variance		Comparison to Study
			\$	%	
Total Property Taxes (\$) Per Median Dwelling Value	\$3,832	\$3,836	(4)	(0.10)	Below
Total Property Taxes as % of Hhld. Income	4.0%	3.8%			Above
Total Municipal Burden: Taxes and W/WW (\$)	\$4,768	\$4,910	(142)	(2.89)	Below
Total Municipal Burden: Taxes and W/WW as % of Hhld. Income	4.9%	4.8%			Above

*Calculated using a simple average of all LAMs (weighted average is 5.2%).



2019 Recommended Tax Policy



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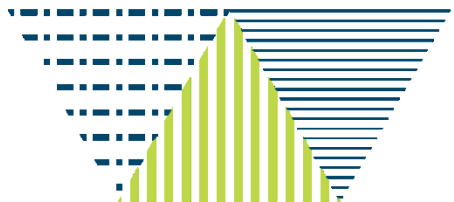
Property Tax Policy, Ratios & Rates

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Property Tax Policy Definitions

- Tax Ratios

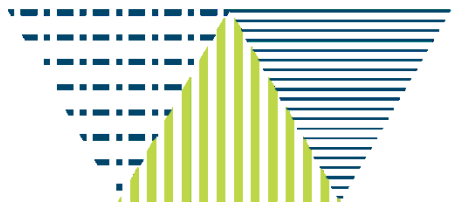
- Tax ratios represent the relationship between the tax rate applicable to the residential property class and the rates for other property classes
- Ratios distribute tax burden between classes relative to the residential class tax ratio, which is equal to "one"
- Province establishes ranges of fairness that guide tax ratio setting by municipalities



Tax Ratio Summary

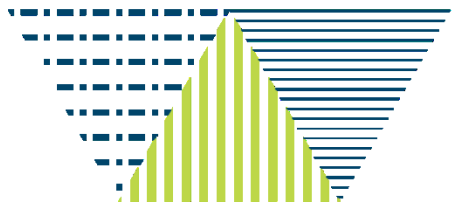
Realty Tax Class	2014 Ratios	2015 Ratios	2016 Ratios	2017 Ratios	2018 Ratios	2019 Start Ratios	Ranges of Fairness		Threshold Ratios	
							Lower Limit	Upper Limit	Threshold	Subject to Levy Restriction
Residential	1.000000	1.000000	1.000000	1.000000	1.000000	1.000000	1.00	1.00	-	N/A
Farm	0.250000	0.250000	0.250000	0.250000	0.250000	0.250000	-	0.25	-	N/A
Managed Forest	0.250000	0.250000	0.250000	0.250000	0.250000	0.250000	0.25	0.25	-	N/A
New Mult-Res	1.000000	1.000000	1.000000	1.000000	1.000000	1.000000	1.00	1.10	-	N/A
Multi-Residential	2.044000	2.044000	2.044000	2.000000	1.970000	1.970000	1.00	1.10	2.00	No
Commercial	1.758600	1.758600	1.758600	1.758600	1.734900	1.734900	0.60	1.10	1.98	No
Industrial	2.630000	2.630000	2.630000	2.630000	2.630000	2.630000	0.60	1.10	2.63	No
Landfill	N/A	N/A	N/A	2.940261	2.940261	2.940261	0.60	1.10	25.00	No
Pipeline	1.702100	1.702100	1.702100	1.702100	1.702100	1.702100	0.60	0.70	-	N/A

Recommended Ratios for
2019 Taxation

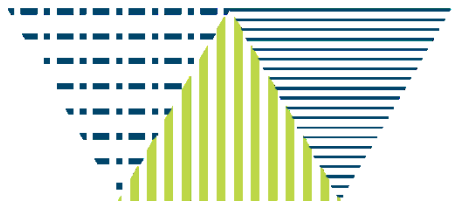


Recommended 2019 Tax Ratios

- Recommended to maintain 2018 Tax Ratios for 2019 Taxation
- This recommendation will keep negative shift with Residential class:
 - Residential property class responsible for 73% of total tax levy
 - Previously utilized negative residential shift to reduce commercial/multi-residential class ratios
 - Higher than average residential property taxes as percentage of household income (as identified from BMA)



Optional Tax Policy



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Property Tax Policy, Ratios & Rates

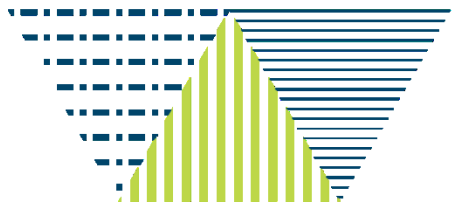
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Agri-Food Business Subclasses for Farm Properties (Property Tax Impact Summary)

- Province announced a new optional subclass for commercial and industrial improvements on farm properties
- Intended to reduce taxation on value added farming activities

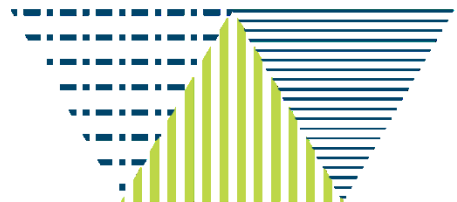
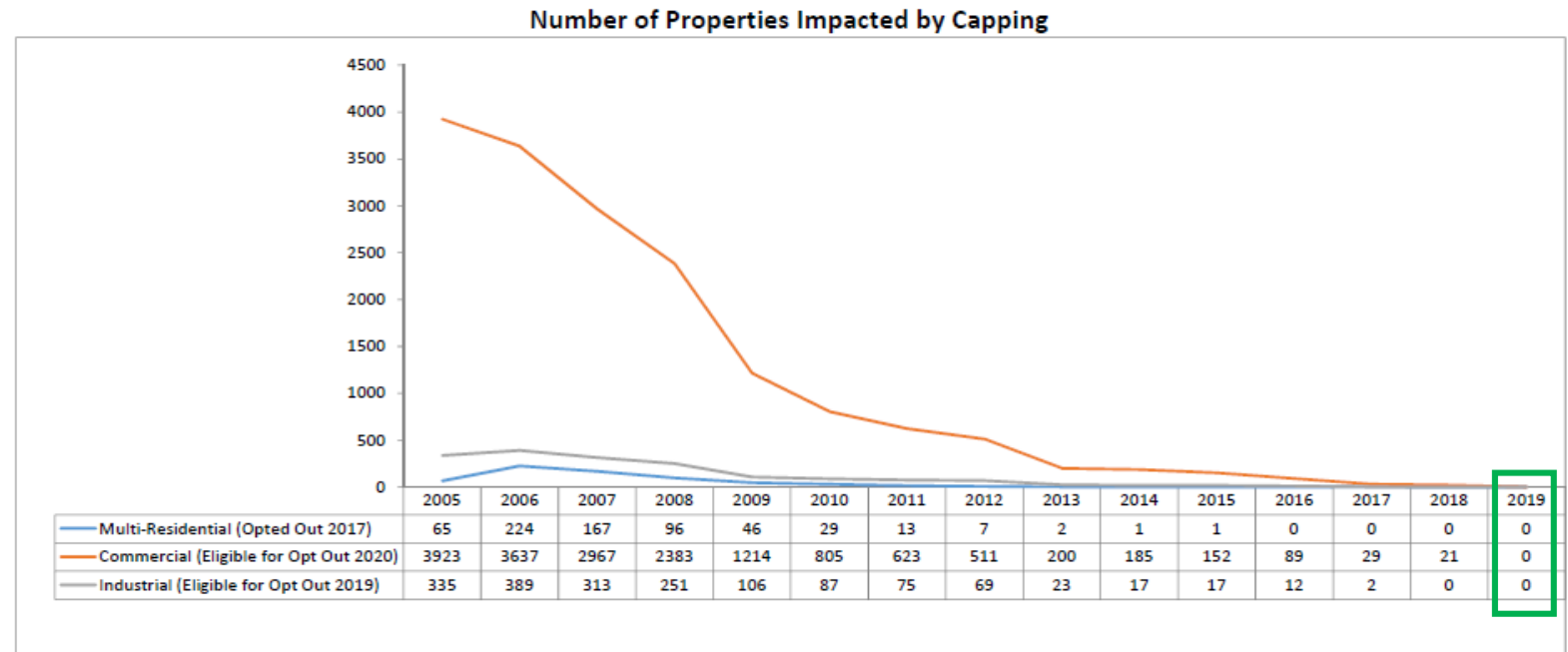
Optional Subclass NOT Recommended

- Limited properties eligible
- Farm property assessment already receive 75% reduction
- Limited property benefit (range \$600 to \$1,000)
- Adopting this subclass may result in significant farm appeals from farms not currently eligible (6,000 farm properties)

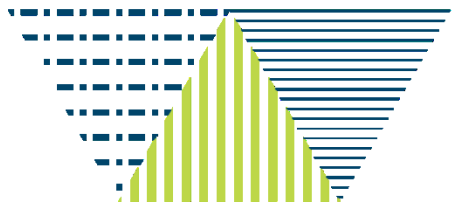


2019 Pro Forma Capping

- Mandatory capping introduced in 1998 for Multi-Res, Commercial & Industrial classes
- Designed to protect properties from annual tax increases above maximum threshold - Funded from claw backs from other properties
- Multi-Residential class - opted out of in 2017
- Industrial class – eligible for opt out in 2019
- Commercial class – No properties capped in 2019, eligible for opt out in 2020



2019 Provincial Policy



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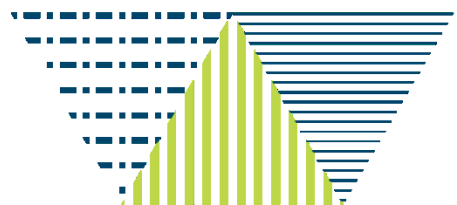
Property Tax Policy, Ratios & Rates

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Education Tax Rate Background & 2019 Rates

- Education rates set annually by the Province
- Current rates creates education “tax room” (i.e., -5.29% rate change vs +3.62% reassessment impact)

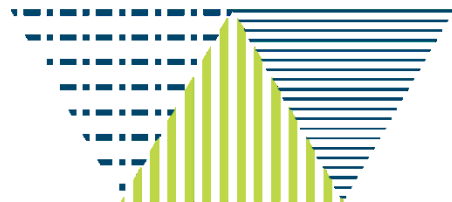
Realty Tax Class	Education Rates		% Change
	2018	2019	
Residential	0.0017000	0.0016100	-5.29%
Farm	0.0004250	0.0004025	-5.29%
Managed Forest	0.0004250	0.0004025	-5.29%
Multi-Residential	0.0017000	0.0016100	-5.29%
New Multi-Residential	0.0017000	0.0016100	-5.29%
Commercial	0.0109000	0.0103000	-5.50%
Landfill	0.0178518	0.0174921	-2.02%
Industrial	0.0134000	0.0129000	-3.73%
New Industrial	0.0109000	0.0103000	-5.50%
Pipeline	0.0109000	0.0103000	-5.50%



Education Commercial/Industrial Vacant Unit/Sub-class Discounts

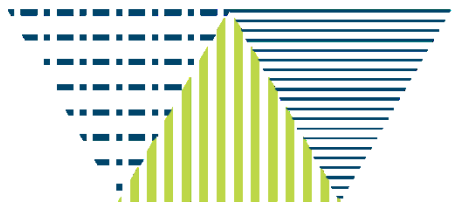
- Province announced phase-out of vacancy programs on education taxes
- More aggressive timeline for phase-out compared to Region approved phase-out plan

	Adopted <u>Regional</u> Policy		Adopted <u>Provincial</u> Policy			
Property Class	Commercial/ Industrial	Commercial/ Industrial	Commercial	Commercial	Industrial	Industrial
Year	Vacant Unit Rebate %	Vacant/Excess Land	Vacant Unit Rebate %	Vacant/Excess Land	Vacant Unit Rebate %	Vacant/Excess Land
2019	20%	30%	15%	15%	15%	15%
2020	10%	30%	0%	0%	0%	0%
2021	0%	22.50%	0%	0%	0%	0%
2022	0%	15%	0%	0%	0%	0%
2023	0%	7.50%	0%	0%	0%	0%
2024 and onwards	0%	0%	0%	0%	0%	0%



Next Steps

- Tax Policy Bylaws - Council – April 25, 2019
- Approved Tax Policy Distributed to Area Treasurers – April 26, 2019
- Area Municipalities Establish Tax Rate (own levy)
- Area Municipalities Complete Tax Billing – June 2019

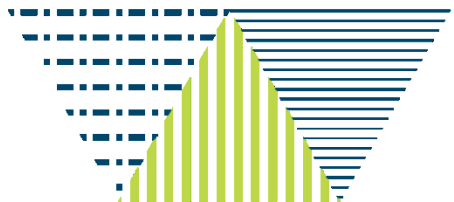


Questions?



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Subject: 2019 Property Tax Policy, Ratios and Rates

Report to: Corporate Services Committee

Report date: Wednesday, April 17, 2019

Recommendations

1. That Regional Council **APPROVE** the following tax ratios and sub-class reductions for the 2019 taxation year:

Property Classification	Tax Ratio	Sub-Class Reduction
Residential	1.000000	
New Multi-Residential	1.000000	
Multi-Residential	1.970000	
Commercial	1.734900	
Commercial – Excess Land	1.734900	30%
Commercial – Vacant Land	1.734900	30%
Industrial	2.630000	
Industrial – Excess Land	2.630000	30%
Industrial – Vacant Land	2.630000	30%
Pipeline	1.702100	
Farmland	0.250000	
Managed Forest	0.250000	
Farmland Awaiting Development 1	1.000000	25%
Farmland Awaiting Development 2	Class Ratio	
Landfill Sites	2.940261	

2. That by having no properties eligible for capping in the industrial class, Regional Council **OPT OUT** of the capping program for the industrial tax class for the 2019 and subsequent taxation years.
3. That the 2019 tax capping program for the commercial class reflecting the following criteria **BE APPROVED**:
 - a. An annual cap **BE SET** at the greater of:
 - i. An amount representing an increase of 10% of the previous year's annualized tax, or
 - ii. An amount representing an increase of 10% of the previous year's Current Value Assessment (CVA) tax.
 - b. That, following the application of the capping program, all increasing properties within \$500 threshold and decreasing properties within \$50 threshold of the CVA taxes **BE MOVED** directly to CVA taxation.
 - c. Properties at CVA tax in 2018 **BE EXCLUDED** from the capping program.
 - d. Properties that would cross over CVA tax in 2019 **BE EXCLUDED** from the capping program.

4. That the phase-out of the capping program over four years for the Commercial property class with 2019 being year three of the four years **BE ADOPTED**.
5. That the option to limit capping protection only to reassessment-related changes prior to 2019 **BE ADOPTED**.
6. That the 2019 capping program **BE FUNDED** by claw back from within respective classes pursuant to section 330 of the Municipal Act.
7. That the Region **BE DIRECTED** to act as a banker, under section 330(6) of the Municipal Act for the 2019 municipal tax adjustments.
8. That the necessary by-laws **BE PREPARED** and **PRESENTED** to Council for consideration and **CIRCULATED** to the Councils of the local area municipalities for information.
9. That this report **BE APPROVED** and **CIRCULATED** to the Councils of the local area municipalities for information.

Key Facts

- The purpose of this report is to set the 2019 tax policy which sets the tax ratio and tax capping program details. Tax policy accounts for property assessment changes and impacts the actual taxes paid by property owners. These tax policy changes may shift the distribution of taxes between property classes.
- The recommended tax policy for 2019 is status quo based on the tax policy decision adopted for the 2018 taxation year and is being recommended by Regional staff and Area Treasurers.
- 2019 is the third year of the four year reassessment phase-in period ending 2020.
- In order for the local area municipalities to complete final tax billings in June, Regional bylaws should be established no later than April.
- The Region approved a levy increase of 3.83%. Local area municipal increases are projected to range from 0% to 9.28%.
- Under the status quo tax policy the residential class in aggregate will see an increase of 3.55% over 2018 as a result of a negative reassessment shift of 0.28% (see table 1).
- The reassessment impacts, proposed tax policy and approved Regional tax levy will result in an increase of approximately \$51 (3.5%) to the typical residential property with a CVA of \$267,711 in 2019 for an annual Regional property tax of \$1,516.
- As of the date of this report, the Province has not released the 2019 education tax rates.

- The Region continues strategies to exit the capping program. The commercial class is projected to have 0 capped properties and 0 clawed back properties for 2019 (eligible to exit 2020). The multi-residential tax class was exited fully in 2017 and the industrial class will be exited fully in 2019.

Financial Considerations

There are no direct costs to the Region as a result of setting 2019 tax policy. There are taxpayer impacts as a result of tax shifts between property classes due to re-assessment phase-in, assessment growth and tax ratio decisions. Detailed analysis of assessment growth, reassessment and phase-in changes and tax ratios is included in the Tax Policy Study attached as Appendix 1.

The recommendations related to capping protection for the commercial property class are funded through a clawing back of tax reductions within the same class. The recommendations will have implications to those existing property owners whose properties are capped and those whose properties are subject to claw back. However, for 2019 it is projected that there will not be any capped properties.

As will be discussed under the Other Policy Consideration section of this report, Council approved the phase-out of the commercial/industrial vacant unit rebate program starting in 2019 through CSD 3-2019. Included as part of the 2019 levy supported operating budget, was a budgeted reduction of approximately \$300,000 for the vacant unit program. Also as part of Report CSD 3-2019, Council approved the phase-out of the vacant/excess land subclass discount which does not have an impact on tax policy until 2022.

Analysis

The Municipal Act provides the Region with the responsibility to establish tax policy to raise levy requirements. These tax policy decisions are reviewed and discussed with local Area Treasurers. Regional staff met with the local Area Treasurers and discussed options for the 2019 tax policy and all Area Treasurers strongly support the recommendation in this report.

Due to the 2016 reassessment, assessment growth and provincial legislation, tax shifts will occur across all property classes. These factors are outside the control of Niagara Regional Council and the budget process. The only opportunity to affect these is through the thorough analysis of options available for ratios and resulting impacts. Staff with the use of a third party consultant undertook analysis of a number of options to arrive at the recommendations presented in this report.

The Region has several tax related performance metrics that are being measured and are reported in Appendix 2. These metrics as well as BMA relative tax burden metrics

were considered in the evaluation of tax policy options identified in this report. Policy decisions proposed have been made with the following considerations in mind:

- Residential taxpayer - The residential class is responsible for 73% of the overall tax levy. Under the status quo tax policy the residential class in aggregate will see an increase of 3.55% over 2018 as a result of a negative reassessment shift of 0.28% (see table 1). This decrease in the residential class' proportionate share of taxes will continue for the balance of the reassessment cycle (2020). In previous years, the Region utilized the negative shift away from the residential class to provide relief to multi-residential and commercial tax classes through reduced tax ratios. As identified in the most recent BMA study, the weighted average residential property taxes payable as a percentage of household income is above the BMA study average (i.e., Niagara 4.9% [5.2% weighted average] versus BMA average 4.8%). The negative shift from the reassessment will assist with narrowing the gap between Niagara and the BMA average.

As can also be seen in Appendix 2 to this report, all three categories of residential developments have average property taxes per unit above the BMA survey average for 2018. The residential categories included in the BMA study are detached bungalow, two-storey homes and senior executive homes.

- Job creation/growth – per Table 2, Industrial properties pay 3.24% of Regional taxes. Due to significant reassessment and appeal reductions in the property class in the recent past, the Industrial class represents 3.24% in taxation which is down from 3.61% in 2016 and remains below or at the BMA relative tax burden averages provided in Appendix 2.
- Commercial properties pay the second largest share (after residential) of Regional taxes at 18.38%. Appendix 2 illustrates that Niagara taxation of shopping centres and hotels are moderately above the BMA average while office buildings and motels are below. It should be noted that significant hotel appeals outstanding may reduce the overall tax burden for this property type if the appeals are successful (\$907 million in CVA). The current assessment practice for hotels is the net rental income approach. A higher potential income per night from a higher concentration of hotels in Niagara Falls tourist areas (51 out of 80 hotels) helps explain the higher Niagara hotel taxes relative to neighbouring municipalities. For the 2018 taxation year Council approved a reduction in the commercial tax ratio from 1.7586 to 1.7349. Under the status quo tax policy for 2019, this reduction in the tax ratio will be retained.

Basis for Policy Recommendations

1. Assessment Growth

The overall real assessment growth that occurred in 2019 was 1.65% (as included in the approved 2019 operating budget), equivalent to \$5,705,152 in tax dollars. Table 1 summarizes the overall assessment growth that occurred in 2018 as well as the impacts affecting each of the tax classes based on maintaining the status quo tax ratios for 2019.

Table 1 – 2019 Tax Levy Impacts by Property Class (Status Quo Policy)

Property Class	2018 Levy	Impacts			2019 Levy	Avg % Increase
		Growth	Phase-In	Levy		
Residential	\$ 250,722,218	\$ 5,647,400	\$ (726,422)	\$ 9,626,725	\$ 265,269,921	3.55%
New Multi-Residential	766,871	13,926	5,500	29,609	\$ 815,906	4.58%
Multi-Residential	14,913,471	(366,364)	(66,918)	545,286	\$ 15,025,475	3.21%
Farm	2,832,219	(30,642)	198,501	112,985	\$ 3,113,063	11.00%
Management Forest	16,253	1,952	770	715	\$ 19,690	9.14%
Commercial	63,691,226	439,228	666,478	2,440,106	\$ 67,237,038	4.88%
Industrial	11,497,293	(14,706)	(48,010)	430,586	\$ 11,865,163	3.33%
Pipelines	2,250,941	14,358	(28,998)	84,212	\$ 2,320,513	2.45%
Landfill	57,780	-	(1,034)	2,137	\$ 58,883	1.91%
Total	\$ 346,748,272	\$ 5,705,152	\$ (133)	\$ 13,272,361	\$ 365,725,652	3.83%
% Increase		1.65%	0%	3.83%	5.47%	

2. Re-Assessment Phase-In and Tax Shifts

Reassessments of all properties is mandated by the Province every four years across Ontario to ensure that current value assessments (CVA) relied upon for property tax purposes are reflective of current market conditions. The 2017 taxation year represented the first phase-in year of the current four year reassessment cycle based on the January 1, 2016 valuation date. This reassessment cycle applies to the taxation years 2017 to 2020. Any assessment related decreases are implemented in the first year of the four year cycle with any increases being phased-in equally over the four years. As a result of decreases coming into effect in the 2017 tax year, the tax shifts across property classes are most significant in year one of the phase-in period which is what occurred with the Industrial property class reduction in 2017. These factors are as a result of MPAC assessment and outside of the control of Niagara Regional Council and the budget process

As mentioned above, this decrease in the residential class' proportionate share of taxes will continue for the balance of the reassessment cycle (2020) as seen in Table 2. This redistribution will shift taxes to commercial and farm properties. The 2019 amounts in Table 2 are based on the proposed status quo rates from 2018. The table represents a starting point for the ratio analysis. This will assist with the residential tax payer affordability.

Table 2 – Multi-Year Tax Distribution by Tax Class

Realty Tax Class	2018 Year End (As Revised)	Share	2019 Levy (As Returned)	Share
Taxable				
Residential	\$ 256,369,618	72.74%	\$ 265,269,922	72.53%
Farm	2,801,577	0.79%	3,113,064	0.85%
Managed Forest	18,205	0.01%	19,689	0.01%
New Multi-Residential	780,797	0.22%	815,906	0.22%
Multi-Residential	14,547,107	4.13%	15,025,476	4.11%
Commercial	64,130,454	18.20%	67,237,038	18.38%
Industrial	11,482,587	3.26%	11,865,164	3.24%
Landfill	57,780	0.02%	58,884	0.02%
Pipeline	2,265,299	0.64%	2,320,512	0.63%
Total Taxable	\$ 352,453,424	100%	\$ 365,725,655	100%

3. Education Rates

At this time, the Province has not released the 2019 education tax rates. It is anticipated that the rates will be established with the Provincial budget in April. In previous years, the Province has maintained a revenue neutral approach for the residential property class meaning that the residential class typically will see a reduction in the education tax rate from year to year. We expect the same for 2019. The education tax “room” that is created as a result of the revenue neutral education approach assists in offsetting municipal tax increases. Table 3 summarizes the historical education tax rates for all property classes.

Table 3 – Historic Education Tax Rates

Realty Tax Class	Education Rates			
	2015	2016	2017	2018
Residential	0.00195000	0.00188000	0.00179000	0.0017000
Farm	0.00048750	0.00047000	0.00044750	0.0004250
Managed Forest	0.00048750	0.00047000	0.00044750	0.0004250
Multi-Residential	0.00195000	0.00188000	0.00179000	0.0017000
New Multi-Residential	0.00195000	0.00188000	0.00179000	0.0017000
Commercial	0.01190000	0.01180000	0.01140000	0.0109000
Landfill	N/A	N/A	0.01822671	0.0178518
Industrial	0.01530000	0.01500000	0.01390000	0.0134000
New Industrial	0.01190000	0.01180000	0.01140000	0.0109000
Pipeline	0.01190000	0.01180000	0.01140000	0.0109000

4. Waste Management Rates

Waste management tax rates are also set based on the Regional tax ratios. The waste management requisition by municipality was already approved through report CSD 7-2019; however the by-law setting for the waste management rates for the 2019 requisitions will be brought forward with the general tax levy by-law as the rates are based on each municipality's assessment and are dependent on the tax ratios (with the exception of Niagara-on-the-Lake). Overall, the waste management levy requirements increased by \$725,976 from \$34,602,337 in 2018 to \$35,328,313 in 2019, an increase of 2.1% before assessment growth. As discussed as part of CSD 7-2019 2019 Budget-Waste Management Services Operating Budget and Requisition, assessment growth in aggregate for the Region is 1.65% for 2018, resulting in the net requisition changes by local area municipality ranging from a decrease of 1.24% to an increase of 1.94% (total net requisition after growth of 0.45%). Therefore the combined waste management levy and general levy increase will result in a residential tax class increase of less than the Regional levy impact noted above.

Tax Policy Considerations

A number of scenarios were reviewed for the 2019 tax policy. All scenarios considered utilizing the negative tax shift away from the residential class to benefit other tax classes (i.e., commercial, multi-residential).

Despite the additional scenarios considered, staff are recommending a status quo scenario for 2019 for the reasons outlined in the Residential Taxpayer Affordability section. Specifically, keeping the negative shift with the residential class will mitigate the residential Regional tax levy increase to 3.55% from 3.83%. Further to this, the BMA study has shown that all residential categories are above the BMA study average. This position has been supported by the Treasurers of the local area municipalities as they are also projecting levy increase ranging from 0 to 9.28%.

Further to this, in previous years, the Region has utilized the negative tax shift away from the residential class to benefit commercial and multi-residential property owners. In addition, the Region also created a New Multi-Residential tax class in 2003 which carries the same ratio as residential properties which provides greater relief to newly constructed multi-residential buildings. See appendix 4 for historical Regional tax ratios.

Consideration was given to reduce the commercial tax burden as the hotel category is above BMA average (as discussed above). However as there are also a number of incentive programs that are available to this segment (including Tax Increment Grants, Development Charge exemptions/grants) this was not recommended. No consideration was given to adjusting the industrial ratio as the industrial tax class allocation is decreasing as noted in Table 2 as well as the fact that the Region is at or below the BMA average for this segment.

2019 Property Tax Levy Impacts

Table 4 shows the Regional tax increases for status quo tax policy. As per Appendix 1, reassessment impacts increased the overall Region taxable assessment by an average of 4.05% for all tax classes. Properties that are reassessed with increases greater than the average will see tax increases greater than the Region's budget increase of 3.83% and conversely properties reassessed less than the 4.05% average will see increases (or decreases) of less than 3.83%.

Table 4 – Regional Tax Increases for Status Quo Tax Policy

Taxation Class	2018 Final		2019	2019 - Status Quo		
	Avg CVA*	Regional Taxes	Avg CVA	Regional Taxes	\$ Increase	% Increase
Residential	258,361	1,465	267,711	1,516	51	3.5%
Multi-Res.	2,449,215	27,361	2,533,468	28,262	901	3.3%
Commercial	735,600	7,237	772,380	7,588	351	4.8%
Industrial	708,763	10,571	735,909	10,960	389	3.7%
Farmland	326,484	463	363,311	514	51	11.1%

Municipal Impacts

As part of the 2019 tax policy review, the background documentation and scenario analysis was distributed to and discussed with the local Area Treasurers. Appendix 1 shows the municipal tax levy impacts of status quo tax policy recommendations in addition to an alternative scenario to be discussed further in the alternatives section. Under this option the relative tax impact on the residential class will be lower than the 2019 general levy increase as a result of the shift away from the residential class due to reassessment impacts.

While the tax shift away from the residential class for the Region as a whole is -0.28% it ranges from -1.55% to 1.73% for each area municipality based on localized assessment trends and is summarized below in Table 5 (Region portion only).

Table 5 – Regional Tax Levy Shifts (2018 Revised to 2019 Notional)

Area Municipality	Assessment Impacts by Tax Class	
	Residential	Total (Includes All Tax Classes)
Fort Erie	-1.55%	-1.58%
Grimsby	1.73%	2.05%
Lincoln	0.75%	0.72%
Niagara Falls	0.07%	0.22%
Niagara-on-the-Lake	0.13%	0.77%
Pelham	-0.86%	-0.73%
Port Colborne	-1.24%	-0.98%
St. Catharines	-0.79%	-0.26%
Thorold	-1.03%	-0.88%
Wainfleet	0.04%	0.53%
Welland	-1.06%	-0.94%
West Lincoln	0.98%	1.13%
Region Average	-0.28%	0.00%

- Six Municipalities (Fort Erie, Port Colborne, Welland, Lincoln, Pelham and St. Catharines) see a tax shift away from the residential class above the Region average of 0.28% under the status quo scenario due to the residential reassessment increase being below the average increase for other municipalities.
- The remaining six municipalities will still see a positive tax shift on the residential class under a status quo scenario ranging from 0.04% to 1.73%.
- Overall (when considering all tax classes) Fort Erie tax payers will incur a reduced share of the Region levy for 2019 in comparison to 2018 under the status quo scenario (-1.58%) with Grimsby tax payers incurring an increased share (2.05%). Any municipality, class or other group of properties subject to a rate of phase-in change around 4.05% would likely carry a similar share of the Regional levy in 2019 as in 2018. Representative property groupings (class, municipality, ward, etc.) experiencing higher rates of change will attract a greater share of the overall levy; and vice-versa for those increasing at rates below the aggregate.

Other Policy Consideration

- Optional Sub-class to Facilitate Reduced Tax Rates for Small-Scale Value-Added Industrial & Commercial Activities on Farms.

The Province announced a new optional subclass for commercial and industrial improvements on farm properties. If a municipality adopts this new optional tax

class, the first \$50,000 of commercial and industrial assessment attached to a farm property will be taxed at 25% of the rate that otherwise would have applied for that specific property. The purpose of this new policy is to support small-scale agri-food enterprises with not more than \$1,000,000 in CVA. MPAC has recently processed and identified all properties eligible for this reduction across Ontario. In total, 250 eligible properties have been identified across the Province with 45 being within the Region. The Province has legislated that eligible properties must receive the benefit on the education portion of property taxes. Upper-tier municipalities have the option of adopting the subclasses which would provide the same reduction of 75% for both area municipal and Regional taxes.

Of the 45 properties identified, the majority are located in NOTL and Lincoln and have been identified by MPAC as wineries. The maximum benefit that these properties could experience is approximately \$500 on education taxes and approximately \$675 to \$1,000 on Region/LAM taxes combined (if adopted).

Staff is not recommending the subclass be adopted which is supported by the Area Treasurers. Existing Provincial legislation has already set the maximum farm property tax ratio at 0.25, meaning that farm properties already benefit from a reduced tax rate when compared to the residential rate. Also, with over 6,000 farm properties located in Niagara, only a select portion have been identified as eligible for the new subclass, meaning if the policy was adopted by the Region, only a small fraction of properties would receive any benefit. Further to this and as outlined on pages 47 and 48 of Appendix 1, additional farm property analysis shows that the combined impact for a typical farm property (when including house/secondary assessments) results in only a 2.78% tax related shift which is less than the 7.40% when only considering the actual farm portion of the typical property. Meaning that the reassessment related impacts on Farm properties may be less overall.

- Changes in discounts to commercial and industrial classes for excess and vacant land.

In 2017, the Province enacted legislation to allow municipalities increased flexibility to create a vacant and excess land reduction program that would better meet the needs of individual municipalities. During early 2019, Regional Council reviewed and approved report CSD 3-2019 which recommended the elimination of this discount over a 4 year phase-out starting 2021. As per the Council approved phase-out schedule, there are no impacts for 2019 for the commercial/industrial subclass property discounts. As part of report CSD 3-2019, Council also approved the phase-out of the vacant unit tax rebate for commercial and industrial properties. This revision to the vacant unit program does not have an impact on the annual tax policy process.

The revisions for both programs have been submitted to Ontario's Minister of Finance in early 2019. Regional staff have been advised by the Province that the program revisions will be presented to the Minister in April 2019 and become legislation in June 2019.

Tax Capping Program

Business tax capping was introduced by the Province in 1998 to ensure the impact of CVA reform was manageable for taxpayers in the Multi-Residential, Commercial and Industrial property classes. The system was originally intended to last just 3 years, with increases on these classes limited to 10% in 1998, 15% in 1999 and 20% in 2000 (referred to as 10-5-5). In 2005 there were over 4,000 properties impacted by capping (1,111 capped, 3,212 subject to claw back) in the amount of \$9,398,541. Appendix 3 shows the number of capped properties by class since 2005. For 2019, there are no capped properties projected. The Region opted out of the capping program for multi-residential properties in 2017 and is eligible for opting out the industrial tax class in 2019. It is being recommended that the necessary steps be completed to fully opt out the industrial tax class from the capping program. While there are no commercial properties projected to be effected by capping in 2019, this class cannot be opted out of until the 2020 taxation year.

Despite there being no projected properties to capped in 2019, staff are recommending that the CVA tax threshold for clawed back properties be maintained at \$50 for 2019 for the commercial property class in the event that a property does become eligible. The claw back threshold was reduced in 2018 from the 2017 level of \$500. The reduced claw back threshold eliminated the potential for a higher contribution being borne by very few properties.

Alternatives Reviewed

As identified above, staff explored numerous options. Given the strong emphasis on affordable housing an alternative analyzed was utilizing half of the negative residential tax shift (0.14% of 0.28%) to reduce the tax ratio of the Multi-Residential tax class from 1.97 (status-quo) to 1.902. As per section 131 of the Residential Tenancy Act, tenants are entitled to an automatic rent reduction when landlord's property taxes have been reduced by more than 2.49% from one year to the next. This alternative is **NOT RECOMMENDED**. Based on current levy requirements for the Region and the anticipated levy requirements for the area municipalities, it is not anticipated that a significant number of properties (if any) would be eligible for the mandatory rent reduction as outlined in the Act, meaning that there would be no legislated requirement for the landlords to pass any of the property tax savings as a result of a ratio reduction to the tenant.

Further to this, Regional Council approved a multi-residential tax class ratio reduction for 2018 which also utilized the negative residential shift from 2018.

Important to note as well, is that the New-multi-residential tax class has a legislated tax ratio of 1 (same as residential tax class). The intent behind the new class as legislated in 2017 (adopted by Region in 2003) is to assist in rental affordability of newly constructed multi-residential properties.

Relationship to Council Strategic Priorities

This tax policy was developed with Residential affordability in mind.

Other Pertinent Reports

- CSD 7-2019 - 2019 Budget-Waste Management Services Operating Budget and Requisition
- CSD 3-2019 - Vacancy Program Revisions Submission to Ministry of Finance

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Appendices

Appendix 1	2019 Tax Policy Study
Appendix 2	Performance Measures
Appendix 3	Number of Properties Impacted by Capping
Appendix 4	History of Regional Tax Ratios

2019

TAX POLICY AND REASSESSMENT IMPACT STUDY

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INTRODUCTION

For the 2017 taxation year all properties in Ontario were reassessed based on their Current Value Assessment (CVA) as of January 1st, 2016. These updated CVA values, as adjusted under the Province's assessment phase-in program, will be the basis of taxation through the 2020 taxation year. Those properties that experienced a CVA increase as of 2017 will be taxed in accordance with a *phase-adjusted* CVA value through 2019, while all properties in the province will be subject to taxation based on their full, unmitigated CVA for 2020.

As we proceed through this cycle the influence of phase-in, growth and a host of other factors will keep the assessment roll in a state of constant flux. As such, it is essential for municipalities to gain a thorough and accurate understanding of assessment and consequential taxation impacts resulting from the newly returned assessment roll every year. Without making every effort to quantify and understand the impacts of the new assessment landscape, it will not be possible for municipalities to make informed and effective decisions in respect of those tax policies that affect the apportionment of the tax burden within and between tax classes.

In order to ensure that informed and locally sensitive tax policy choices can be made in a timely manner, a careful examination of the following relationships and circumstances must be undertaken:

1. Revenue growth and/or loss that has occurred over the past year, which will inform the municipality's starting point, or revenue limit, for budgetary and rate setting purposes;
2. The inevitable tax impacts related to reassessment, the assessment phase-in program and other changes to the assessment roll;
3. The redistribution of the property tax burden, which will occur within and between classes due to the reassessment, phase-in, and growth trends;
4. The effect of status quo and optional tax policy schemes on the distribution of the tax burden among classes, including "levy restriction" provisions, where applicable; and
5. The local implications and impacts related to 2019 provincial education tax rates.

Municipalities may also choose to further evaluate:

1. The impact of the "tax capping" protection program on both the capped and uncapped classes, including the effects of any optional capping tools that may be adopted by the municipality;
2. Making changes to existing tax policies affecting taxation on vacant property or land and farmland awaiting development;
3. The implications of the use or discontinuation of other optional tax policy tools, such as optional tax classes and graduated taxation; and/or
4. Reviewing or revising programs that provide tax relief for charitable and similar organizations, and low income seniors and persons with disabilities.

In satisfying their local tax policy responsibilities, municipalities must be cognisant of the following key considerations:

1. Changes in current value assessment (CVA) do not occur consistently for all property within a municipality in any given year. Because of this, shifts in the tax burden are inevitable, within ratepayer groups, and between classes.
2. Measuring municipal tax increases and decreases becomes a matter of comparing the current year's adopted tax rate against a revenue neutral tax rate to raise last year's levy. As a result of the changing values on the assessment roll, the current year's tax rate cannot be compared to last year's actual rate.
3. Similarly, changes in a property owner's taxes may be due to the combined effect of:
 - Reassessment (equity) change;
 - Changes to a property's physical state, condition or use;
 - Assessment phase-in adjustments;
 - Tax policy decisions made by Council;
 - Budgetary (levy) change for the municipality; and/or
 - Provincial education tax rates.
4. Outcomes of Provincial programs to restrict the effect of tax increases to the business classes (e.g. levy restriction, limitations on tax ratio movement and capping) will also be affected by overall changes in assessment from year-to-year.

Scope of the Study

This study has been prepared for the consideration of staff and Council to assist with the municipality's tax policy responsibilities. The core material is intended to provide a thorough analysis of the local tax policy scheme, as well as the impact of reassessment, phase-in, growth and other changes to the municipality's assessment base.

The analysis contained in this report is based on the 2018 tax policy parameters adopted by the municipality, the general purpose municipal levies imposed for 2018, and on the assessment roll as revised for 2018 and returned for 2019 taxation.

These various inputs and parameters have been relied upon to build a thorough quantitative model of the municipality's 2019 property assessment and taxation landscape as it would exist in the absence of any budgetary or tax policy changes. We will also model the impacts of various tax policy options and choices to demonstrate how they might influence final tax outcomes.

The key elements of this report can be categorized into the following sections.

Part One: Assessment and Revenue Growth

- Real assessment growth;
- Real revenue growth; and
- The distribution of growth patterns.

Part Two: Market Value Update and Assessment Phase-In

- Market Value Update;
- Assessment Phase-In Program;
- Measuring and Understanding Changes in Full and Phased CVA; and
- Distribution of Phase-In and Value Change Patterns.

Part Three: Reassessment and Phase-In Related Taxation Impacts

- 2019 Start Ratios and Revenue Neutral (notional) Tax Rates;
- 2019 Notional Taxable Levies and PIL Revenue;
- Quantification of Inter-Class Tax Shifts;
- Taxation Impacts/Implications of Assessment Phase-In; and
- Changing Tax Patterns for Typical Properties and other Taxpayer Groupings.

Part Four: Expanded Farm Class and Whole-Farm Impact Analysis

In light of the increased attention to changing farm values throughout the province, MTE has added a new section to this study for 2019. In this section we discuss and consider a host of factors relevant to considering the rate of assessment and tax change being seen for the farm property class and actual farms. Specifically, this section addresses

- Farm class and farm class portions vs. whole farm assessment and tax;
- Tax impacts being experienced at the portion and whole-farm level; and
- The new on-farm business sub-classes.

Part Five: Municipal Tax Policy Sensitivity Analysis

Municipalities need to address a variety of tax policy choices and options that will ultimately impact the distribution of taxes within and between the various classes of property. To this end, MTE has undertaken analysis of:

- Starting tax ratios and relationships to Provincial limits; and
- Tax impacts for 2019 associated with various tax policy and levy change scenarios.

Part Six: Other Revenue and Levies

In this section, MTE considers the following:

- Potential changes in the education tax levy from 2018 to 2019 based on the municipality's changing assessment base and the 2019 Provincial education tax rates;
- Assessment for qualifying Payment in Lieu (PIL) properties in respect of which education levy amounts may be retained by the local municipality; and
- Levies associated with linear properties including hydro rights-of-way, railroads and the new category of shortline railroads.

Part Seven: Business Tax Capping

Capping for the commercial, industrial and multi-residential tax classes is analyzed based on the application of the various options and tools that have been made available to municipalities including:

- An estimate of the costs of capping protection for 2018;
- Quantifying the pressures on decrease retention and claw-back rates and identification of shortfall risks; and
- The options open to the municipality in respect of capping exit strategies for each of the three capped classes.

Part Eight: Consultants' Report and Suggested Next Steps/Additional Study

Part seven of this report contains a summary of the observations and thoughts that arose throughout the preparation and review of this report, including any suggestions for next steps or additional analysis that these base-line results may give rise to.

The qualitative content in this final section does not represent a comprehensive commentary on any issue and it is not intended to be provided as policy advice, but only as general observations, which may or may not be of interest to the reader. Where the report identifies areas of concern to Council or staff, additional work should be undertaken to explore alternate policy options. As well, the effects of further municipal policy change or budgetary decisions should also be modelled.

Assumptions and Limiting Conditions

In reviewing the results set out in this report, the following assumptions and limiting conditions should be considered.

The possibility that further adjustments to tax policy could be introduced by the Province does exist. Results presented in this report may be affected by Provincial regulatory and/or statutory changes or decisions about municipal tax policy that could occur subsequent to the publication of this document. MTE will update the analysis, upon request, in such an event.

Analysis contained in the report is based on the use of tax rates for general municipal purposes only. Special area rates have been applied where appropriate and necessary in order to undertake the pro forma capping analysis.

All municipal tax rate calculations and tax levies have been calculated based on the following protocol:

- 2018 tax calculations are based on actual 2018 tax rates as supplied by the municipality to MTE;
- Revenue neutral rates have been calculated for the purposes of 2019;
- The municipality's current tax ratio schedule has been applied for 2019, except where levy restriction (hard capping) and/or optional property classes apply. In these circumstances, new starting ratios have been calculated;
- Tax amounts represent CVA taxes; no capping adjustments have been applied except where explicitly noted;
- Tax rate calculations have been based on taxable assessment only and exclude grantable (payment in lieu) assessment as requested by the municipality;
- Revenue from payments in lieu of taxes has been included at the full value of assessment times the appropriate tax rate. Recognizing that municipalities may be unable to recover the full amount of those revenues from the Federal or Provincial governments, appropriate allowances should be made in interpreting the results; and
- All 2019 education values are based on speculative / estimated tax rates. These amounts are provided for general illustrative purposes and must be taken as completely hypothetical.

Important Note Regarding Provincial Policy and Legislation

The possibility that changes in tax policy may be introduced by the Province does exist, and the results presented in this report may be affected by Provincial regulatory and/or statutory changes that could occur subsequent to the publication of this document. In the absence of specific direction to the contrary, however, existing property tax rules have been applied.

PART ONE: ASSESSMENT AND REVENUE GROWTH

The Assessment Roll is a living data set, which is continually evolving in response to real-world market and property changes. The assessed value of a property can change for a number of reasons; for the purposes of the property tax system in Ontario, all valuation changes must be considered in one of only two categories:

- 1) Growth (positive or negative), which reflects the value increase or decrease associated with a change to a property's state, use or condition; or
- 2) Valuation change, which is driven by changes in the real estate market over time and reflected via Reassessment and Phase-In updates.

Real Assessment Growth

Property assessments change in one of two fundamental ways; to reflect a property's value as of a more current or recent point in time (reassessment change), or to reflect actual changes in a property's state, condition or use. Changes categorized as the latter represent real assessment growth and it is critical to measure and understand growth separately from the impacts of market change due to the reassessment and the four-year phase-in program. While assessment growth and loss impacts the municipal revenue stream, reassessment changes should not.

To effectively measure growth independently it is necessary to separately quantify any changes made to assessment values set for taxation in 2018, from the changes occurring between 2018 and 2019. This growth component will be made up of both positive and negative growth. Positive growth will be reflective of such things as new construction, additions, improvements, etc. The drivers of negative growth may include demolitions, Minutes of Settlement, and/or decisions of the Assessment Review Board.

Table 1 provides a comparison between the Full CVA values contained on the roll as returned for 2018 and the roll as revised for 2018. Theoretically, Table 1 summarizes the net in-year changes to property within the municipality, as reflected for assessment and taxation purposes. Table 2 examines how this growth is distributed among the constituent lower tiers.

Table 3 has been prepared as a means of comparing the Full CVA growth realized during 2018 with the municipality's 2017 growth.

Table 1
2018 Assessment Growth Resulting from Changes in the
State and/or Use of Property

Realty Tax Class	2018 Full CVA		Full Growth	
	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	47,454,073,405	48,515,013,074	1,060,939,669	2.24%
Farm	2,447,113,831	2,421,864,835	-25,248,996	-1.03%
Managed Forest	13,412,500	14,974,700	1,562,200	11.65%
New Multi-Residential	148,124,700	150,482,442	2,357,742	1.59%
Multi-Residential	1,426,261,900	1,391,666,340	-34,595,560	-2.43%
Commercial	7,232,884,723	7,285,824,308	52,939,585	0.73%
Industrial	877,677,621	870,844,399	-6,833,222	-0.78%
Landfill	3,607,900	3,607,900	0	0.00%
Pipeline	245,153,000	246,821,000	1,668,000	0.68%
Sub-Total Taxable	59,848,309,580	60,901,098,998	1,052,789,418	1.76%
<i>Payment in Lieu</i>				
Residential	34,583,804	34,577,004	-6,800	-0.02%
Farm	491,000	491,000	0	0.00%
Commercial	642,886,199	641,128,299	-1,757,900	-0.27%
Industrial	13,688,200	13,814,800	126,600	0.92%
Landfill	1,706,000	1,706,000	0	0.00%
Sub-Total PIL	693,355,203	691,717,103	-1,638,100	-0.24%
Total (Taxable + PIL)	60,541,664,783	61,592,816,101	1,051,151,318	1.74%

Table 2
2018 Assessment Growth Resulting from Changes in the
State and/or Use of Property

Local Municipality	2018 Full CVA		Full Growth	
	As Returned	As Revised	\$	%
Fort Erie	3,792,643,272	3,880,588,772	87,945,500	2.32%
Grimsby	4,718,119,017	4,860,105,126	141,986,109	3.01%
Lincoln	3,971,382,456	4,010,652,865	39,270,409	0.99%
Niagara Falls	12,048,160,621	12,296,998,024	248,837,403	2.07%
Niagara-on-the-Lake	5,484,557,483	5,591,385,701	106,828,218	1.95%
Pelham	2,735,384,300	2,790,353,100	54,968,800	2.01%
Port Colborne	1,934,391,236	1,949,497,036	15,105,800	0.78%
St. Catharines	15,354,034,953	15,458,482,062	104,447,109	0.68%
Thorold	2,307,411,400	2,415,195,000	107,783,600	4.67%
Wainfleet	1,129,343,718	1,144,824,018	15,480,300	1.37%
Welland	4,789,751,627	4,868,049,127	78,297,500	1.63%
West Lincoln	2,276,484,700	2,326,685,270	50,200,570	2.21%
Niagara Region	60,541,664,783	61,592,816,101	1,051,151,318	1.74%

Table 3
Year-To-Year Assessment Growth Comparison
(2017 vs 2018 Full CVA)

Realty Tax Class	2017 Full CVA Growth		2018 Full CVA Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	830,024,099	1.78%	1,060,939,669	2.24%
Farm	-31,385,969	-1.27%	-25,248,996	-1.03%
Managed Forest	-157,900	-1.16%	1,562,200	11.65%
New Multi-Residential	30,574,200	26.01%	2,357,742	1.59%
Multi-Residential	-352,500	-0.02%	-34,595,560	-2.43%
Commercial	39,904,573	0.55%	52,939,585	0.73%
Industrial	-2,157,979	-0.25%	-6,833,222	-0.78%
Landfill	-4,668,600	-56.41%	0	0.00%
Pipeline	1,860,000	0.76%	1,668,000	0.68%
Sub-Total Taxable	863,639,924	1.46%	1,052,789,418	1.76%
<i>Payment in Lieu</i>				
Residential	-555,000	-1.58%	-6,800	-0.02%
Farm	0	0.00%	0	0.00%
Commercial	-217,700	-0.03%	-1,757,900	-0.27%
Industrial	1,700	0.01%	126,600	0.92%
Landfill	0	0.00%	0	0.00%
Sub-Total PIL	-771,000	-0.11%	-1,638,100	-0.24%
Total (Taxable + PIL)	862,868,924	1.45%	1,051,151,318	1.74%

Growth vs. Loss

As noted above, a municipality's net growth is the product of both positive and negative growth, or gains and loss in CVA. While it is ultimately this net figure that will inform taxation and revenue models as we move into the new taxation year, considering the differential patterns and impacts of growth and loss can be a valuable exercise.

When these change patterns are broken out as in Table 4, it is possible to see trends and movement within the assessment base that may otherwise be obscured or skewed when only the net impact is being considered. For example, a trend of robust growth within a subset of a class may not be as evident if it is being offset by losses in another subset.

Considering loss patterns independently can assist in identifying potential areas of concern with respect to property valuations within a class, tax erosion stemming from appeals, or even economic pressures being felt within certain sectors, industries and/or geographic areas. Conversely, considering positive growth on its own can provide a better understanding of how new development, improvements and expansions are impacting the assessment base.

Table 4
2018 Assessment Growth and Loss Patterns
(Full CVA)

Realty Tax Class	Positive CVA Growth		Negative CVA Growth		Net CVA Growth	
	\$	%	\$	%	\$	%
<i>Taxable</i>						
Residential	1,247,527,596	2.63%	-186,587,927	-0.39%	1,060,939,669	2.24%
Farm	68,723,394	2.81%	-93,972,390	-3.84%	-25,248,996	-1.03%
Managed Forest	1,686,200	12.57%	-124,000	-0.92%	1,562,200	11.65%
New Multi-Residential	2,683,800	1.81%	-326,058	-0.22%	2,357,742	1.59%
Multi-Residential	10,762,200	0.75%	-45,357,760	-3.18%	-34,595,560	-2.43%
Commercial	223,113,064	3.08%	-170,173,479	-2.35%	52,939,585	0.73%
Industrial	34,008,927	3.87%	-40,842,149	-4.65%	-6,833,222	-0.78%
Landfill	0	0.00%	0	0.00%	0	0.00%
Pipeline	4,242,000	1.73%	-2,574,000	-1.05%	1,668,000	0.68%
Sub-Total Taxable	1,592,747,181	2.66%	-539,957,763	-0.90%	1,052,789,418	1.76%
<i>Payment in Lieu</i>						
Residential	349,000	1.01%	-355,800	-1.03%	-6,800	-0.02%
Farm	0	0.00%	0	0.00%	0	0.00%
Commercial	12,337,100	1.92%	-14,095,000	-2.19%	-1,757,900	-0.27%
Industrial	134,000	0.98%	-7,400	-0.05%	126,600	0.92%
Landfill	0	0.00%	0	0.00%	0	0.00%
Sub-Total PIL	12,820,100	1.85%	-14,458,200	-2.09%	-1,638,100	-0.24%
Total (Tax + PIL)	1,605,567,281	2.65%	-554,415,963	-0.92%	1,051,151,318	1.74%

The results in these tables are not intended to provide a complete understanding of the assessment and economic dynamics of the municipality, however, considering growth in these ways can be an important first step to the identification of potentially important trends.

Phase Adjusted CVA

As phased CVA values were actually employed for taxation in 2018, it is the difference between the phased assessment contained on the 2018 returned and revised rolls that represents the municipality's real assessment growth (or loss) for 2019 budget purposes. These details are summarized by class and local municipality in Tables 5 and 6 respectively.

Table 5
2018 Phase Adjusted Assessment Growth

Realty Tax Class	2018 Phase Adjusted CVA		Growth	
	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	44,244,870,351	45,240,747,203	995,876,852	2.25%
Farm	1,997,755,669	1,976,142,587	-21,613,082	-1.08%
Managed Forest	11,464,213	12,840,739	1,376,526	12.01%
New Multi-Residential	135,231,800	137,687,680	2,455,880	1.82%
Multi-Residential	1,334,961,674	1,302,167,148	-32,794,526	-2.46%
Commercial	6,577,283,039	6,623,548,330	46,265,291	0.70%
Industrial	810,434,494	808,952,273	-1,482,221	-0.18%
Landfill	3,465,350	3,465,350	0	0.00%
Pipeline	233,203,729	234,691,343	1,487,614	0.64%
Sub-Total Taxable	55,348,670,319	56,340,242,653	991,572,334	1.79%
<i>Payment in Lieu</i>				
Residential	29,535,632	29,502,283	-33,349	-0.11%
Farm	431,500	431,500	0	0.00%
Commercial	609,817,827	608,666,087	-1,151,740	-0.19%
Industrial	11,253,544	11,375,076	121,532	1.08%
Landfill	1,257,850	1,257,850	0	0.00%
Sub-Total PIL	652,296,353	651,232,796	-1,063,557	-0.16%
Total (Taxable + PIL)	56,000,966,672	56,991,475,449	990,508,777	1.77%

Table 6
2018 Phase Adjusted Assessment Growth

Local Municipality	2018 Phase Adjusted CVA		Growth	
	As Returned	As Revised	\$	%
Fort Erie	3,621,652,318	3,708,186,880	86,534,562	2.39%
Grimsby	4,209,897,538	4,337,412,240	127,514,702	3.03%
Lincoln	3,586,928,780	3,625,822,739	38,893,959	1.08%
Niagara Falls	11,144,090,244	11,375,340,598	231,250,354	2.08%
Niagara-on-the-Lake	4,981,937,725	5,081,683,194	99,745,469	2.00%
Pelham	2,560,231,201	2,611,943,917	51,712,716	2.02%
Port Colborne	1,827,629,817	1,843,266,987	15,637,170	0.86%
St. Catharines	14,343,966,393	14,443,423,751	99,457,358	0.69%
Thorold	2,173,843,110	2,276,958,216	103,115,106	4.74%
Wainfleet	1,015,744,945	1,030,375,581	14,630,636	1.44%
Welland	4,522,722,637	4,598,364,737	75,642,100	1.67%
West Lincoln	2,012,321,964	2,058,696,609	46,374,645	2.30%
Niagara Region	56,000,966,672	56,991,475,449	990,508,777	1.77%

Revenue Growth

On an annualized basis, the net growth related gain or loss in taxation is the difference between the total tax amount as determined against the returned roll and the total tax as determined against the roll as revised. Not all of this value will, however, have been realized in the form of additional revenue during the 2018 year. Many changes to the roll for 2018 taxation would not have been effective for the full tax year, or in the case of year-end changes, for any portion of the year. In contrast, some changes will have reached back to prior years. The full impact of this growth will only be realized on a go-forward basis, as it serves to inform the municipality's "revenue limit" for 2019, which represents the tax dollars that can be raised for the current year under a zero percent levy change scenario.

Table 7 provides a summary of the net effect of all annualized in-year and year-end changes in CVA for 2018 expressed in general levy tax dollars. This is accomplished by applying the 2018 general tax rate against the values as returned for 2018 and comparing this to the taxation that would be raised against the revised assessment for the year. Table 8 provides a summary of the current year's Regional growth by local municipality. Table 9 compares the municipality's current year revenue growth against the final growth figures calculated as of roll return for 2018.

Table 7
2018 Annualized Revenue Growth by Property Class
(Regional General Levy)

Realty Tax Class	2018 Regional General Levy		Revenue Growth	
	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	\$250,722,218	\$256,369,618	\$5,647,400	2.25%
Farm	\$2,832,219	\$2,801,577	-\$30,642	-1.08%
Managed Forest	\$16,253	\$18,205	\$1,952	12.01%
New Multi-Residential	\$766,871	\$780,797	\$13,926	1.82%
Multi-Residential	\$14,913,471	\$14,547,107	-\$366,364	-2.46%
Commercial	\$63,691,226	\$64,130,454	\$439,228	0.69%
Industrial	\$11,497,293	\$11,482,587	-\$14,706	-0.13%
Landfill	\$57,780	\$57,780	\$0	0.00%
Pipeline	\$2,250,941	\$2,265,299	\$14,358	0.64%
Sub-Total Taxable	\$346,748,272	\$352,453,424	\$5,705,152	1.65%
<i>Payment in Lieu</i>				
Residential	\$167,490	\$167,300	-\$190	-0.11%
Farm	\$612	\$612	\$0	0.00%
Commercial	\$5,958,393	\$5,947,061	-\$11,332	-0.19%
Industrial	\$155,087	\$156,900	\$1,813	1.17%
Landfill	\$20,973	\$20,973	\$0	0.00%
Sub-Total PIL	\$6,302,555	\$6,292,846	-\$9,709	-0.15%
Total (Taxable + PIL)	\$353,050,827	\$358,746,270	\$5,695,443	1.61%

Table 8
2018 Annualized Revenue Growth by Area Municipality
 (Regional General Levy)

Local Municipality	2018 Regional General Levy		Revenue Growth	
	As Returned	As Revised	\$	%
Fort Erie	\$22,057,615	\$22,551,062	\$493,449	2.24%
Grimsby	\$25,379,956	\$26,167,838	\$787,883	3.10%
Lincoln	\$20,380,055	\$20,650,523	\$270,468	1.33%
Niagara Falls	\$76,834,567	\$78,173,195	\$1,338,627	1.74%
Niagara-on-the-Lake	\$29,831,818	\$30,453,118	\$621,300	2.08%
Pelham	\$14,442,506	\$14,746,837	\$304,333	2.11%
Port Colborne	\$11,617,162	\$11,717,771	\$100,610	0.87%
St. Catharines	\$94,348,045	\$94,654,250	\$306,207	0.32%
Thorold	\$13,716,586	\$14,304,660	\$588,073	4.29%
Wainfleet	\$5,217,626	\$5,295,274	\$77,648	1.49%
Welland	\$28,647,307	\$29,165,410	\$518,102	1.81%
West Lincoln	\$10,577,586	\$10,866,333	\$288,747	2.73%
Niagara Region	\$353,050,829	\$358,746,271	\$5,695,447	1.61%

Table 9
Year-To-Year Revenue Growth Comparison
(2017 vs 2018 General Levy)

Realty Tax Class	2017 Revenue Growth		2018 Revenue Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	\$4,444,246	1.84%	\$5,647,400	2.25%
Farm	-\$17,053	-0.66%	-\$30,642	-1.08%
Managed Forest	-\$287	-1.86%	\$1,952	12.01%
New Multi-Residential	\$140,041	23.21%	\$13,926	1.82%
Multi-Residential	\$25,893	0.17%	-\$366,364	-2.46%
Commercial	\$479,032	0.77%	\$439,228	0.69%
Industrial	\$42,823	0.38%	-\$14,706	-0.13%
Landfill	\$245	0.43%	\$0	0.00%
Pipeline	\$16,488	0.74%	\$14,358	0.64%
Sub-Total Taxable	\$5,131,428	1.53%	\$5,705,152	1.65%
<i>Payment in Lieu</i>				
Residential	-\$2,970	-1.87%	-\$190	-0.11%
Farm	\$0	0.00%	\$0	0.00%
Commercial	\$259,510	4.53%	-\$11,332	-0.19%
Industrial	-\$1,243	-0.88%	\$1,813	1.17%
Landfill	\$0	0.00%	\$0	0.00%
Sub-Total PIL	\$255,297	4.22%	-\$9,709	-0.15%
Total (Taxable + PIL)	\$5,386,725	1.58%	\$5,695,443	1.61%

PART TWO: MARKET VALUE UPDATE AND ASSESSMENT PHASE-IN

Reassessment

As of the return of the roll for 2017 taxation, all property values in Ontario were updated to reflect their *current value* as of January 1st, 2016 versus the values used for the 2013 through 2016 taxation years, which were based on a valuation date of January 1st, 2012.

By all accounts this may represent the most dramatic and volatile market value update in well over a decade. Some change patterns are driven by *real world* volatility and change in the real estate market, business environment and general economic climate that we have witnessed since early 2012. Other patterns are more directly related to regional and/or industry specific factors, and also by changes to assessment practices and methodologies that have been refined, challenged, and/or updated since the last reassessment.

In consideration of all these pressures and change factors, it is imperative that municipalities thoroughly understand the scope and magnitude of the market value update, and the corresponding tax implications for various classes and groupings of ratepayers.

To help illustrate the impacts of both market value change and the application of the phase-in program, various elements of this report incorporate quantitative results based on both full and phase-in mitigated CVA values.

Market Value Update: Changes in Full CVA

A comparison of full CVA as at January 1, 2012 (Phase-In Base) and January 1, 2016 (Full / Phase-In Destination) as contained on the roll as returned for 2019 is provided in Table 10. This table relies on the full CVA value of all properties, exclusive of any assessment phase-in adjustments. While not all of these values will be used for taxation until the 2020 tax year, it is important to review the magnitude and pattern of pure value changes related directly to the market update.

Market Value Increases and Decreases

Every property in the municipality is changing to reflect its own circumstances and while the net class level results do provide a general indication as to how the real estate markets have changed across different sectors, complex change trends also exist within classes. Table 11 has been prepared to summarize the change patterns for properties that are subject to market value increases and those with market value decreases. This table also gives the reader an understanding as to the frequency and relative magnitude of increasing and decreasing assessment pools. This additional layer of detail clearly shows that there is more change occurring than might be evident if only class level results are considered.

Table 10
Summary of Latest Market Value Update
(As of Roll Return for 2019)

Realty Tax Class	Full CVA (Destination) Values		Market Value Update	
	Jan. 1, 2012 (2013-2016 Taxation)	Jan. 1, 2016 (2017-2020 Taxation)	\$	%
<i>Taxable</i>				
Residential	42,252,426,190	48,515,013,074	6,262,586,884	14.82%
Farm	1,591,797,789	2,421,864,835	830,067,046	52.15%
Managed Forest	10,938,262	14,974,700	4,036,438	36.90%
New Multi-Residential	126,684,138	150,482,442	23,798,304	18.79%
Multi-Residential	1,251,666,894	1,391,666,340	139,999,446	11.19%
Commercial	6,130,123,061	7,285,824,308	1,155,701,247	18.85%
Industrial	806,194,157	870,844,399	64,650,242	8.02%
Landfill	6,353,700	3,607,900	-2,745,800	-43.22%
Pipeline	222,561,681	246,821,000	24,259,319	10.90%
Sub-Total Taxable	52,398,745,872	60,901,098,998	8,502,353,126	16.23%
<i>Payment in Lieu</i>				
Residential	25,703,160	34,577,004	8,873,844	34.52%
Farm	372,000	491,000	119,000	31.99%
Commercial	585,385,002	641,128,299	55,743,297	9.52%
Industrial	9,005,948	13,814,800	4,808,852	53.40%
Landfill	816,000	1,706,000	890,000	109.07%
Sub-Total PIL	621,282,110	691,717,103	70,434,993	11.34%
Total (Taxable + PIL)	53,020,027,982	61,592,816,101	8,572,788,119	16.17%

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Table 11
Distribution, Frequency and Magnitude of Market Value Increases and Decreases

Realty Tax Class	Increasing Properties			Decreasing Properties		
	Count	% of Class CVA	Market Value Update \$	Count	% of Class CVA	Market Value Update \$
<i>Taxable</i>						
Residential	165,202	94.68%	6,548,537,487	9,465	5.32%	-285,950,603
Farm	5,889	93.74%	891,444,909	192	6.26%	-61,377,863
Managed Forest	144	90.38%	4,267,942	19	9.62%	-231,504
New Multi-Residential	27	94.19%	25,589,526	12	5.81%	-1,791,222
Multi-Residential	379	75.58%	178,998,395	207	24.42%	-38,998,949
Commercial	6,124	86.79%	1,324,552,264	1,580	13.21%	-168,851,017
Industrial	968	70.61%	123,784,338	309	29.39%	-59,134,096
Landfill	1	12.62%	285,100	1	87.38%	-3,030,900
Pipeline	27	100.00%	24,259,319	1	0.00%	0
Sub-Total Taxable	178,761	92.94%	9,121,719,280	11,786	7.06%	-619,366,154
<i>Payment in Lieu</i>						
Residential	130	84.81%	10,149,444	62	15.19%	-1,275,600
Farm	1	100.00%	119,000	0	0.00%	0
Commercial	228	90.45%	64,924,432	88	9.55%	-9,181,135
Industrial	62	95.78%	4,879,452	27	4.22%	-70,600
Landfill	1	78.21%	896,300	1	21.79%	-6,300
Sub-Total PIL	422	90.25%	80,968,628	178	9.75%	-10,533,635
Total (Taxable + PIL)	179,183	92.91%	9,202,687,908	11,964	7.09%	-629,899,789
						-12.60%

Assessment Phase-In Program

Where an increase in market value has materialized, the increase is added to the property's "Phased" CVA in twenty-five percent (25%) increments each year over the four-year period. As such, effected taxpayers will not be taxed on their new full market value until 2020, which is the last year of the new assessment cycle.

Assessment decreases are not phased-in. Where a property's CVA has been reduced as a result of reassessment, the new, lower CVA has been set as the property's phased or effective CVA for the duration of the four-year assessment cycle.

The phase-in is calculated and administered at the property portion, or RTC/RTQ level, which means that a property with multiple portions could have some portions that are increasing and some that are decreasing. The following has been prepared to illustrate how this works at the property and portion level.

		Market Value Update		Eligible Phase-In Amount	Phase-Adjusted Assessment			
		1/1/2012	1/1/2016		2017	2018	2019	2020
Property A	RT	100,000	↑ 140,000	40,000	110,000	120,000	130,000	140,000
Property A	CT	100,000	↓ 80,000	0	80,000	80,000	80,000	80,000
Property B	RT	100,000	→ 100,000	0	100,000	100,000	100,000	100,000

While MPAC is chiefly responsible for the administration of the assessment phase-in program, it is critical that all municipal finance staff and Council members have an understanding of both the mechanics of this program, and the impacts it will have on the municipality and taxpayers.

The following tables have been prepared to consider the separate and combined impacts of these two critical factors that shape and influence the assessment values that are utilized for taxation purposes.

The cumulative effect of each property specific change, and the application of the phase-in adjustments at the portion (RTC/RTQ) level produce a unique pattern of progression that the assessment base will go through over the cycle. This is set out by year and class in Table 12.

Table 13 looks more specifically at the change in phased CVA from 2018 to 2019 as the third installment of increased CVA is added to those properties with market values that were higher in 2016 than they were in 2012. Table 14 displays the taxable only assessment phase-in change by local municipality.

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Table 12
Progression of Phased Adjusted CVA: 2017 to 2020

Realty Tax Class	2016 Full CVA Jan. 1, 2012 Value	Progression of CVA for Taxation Purposes			2020 Full CVA Jan. 1, 2016 Value
		2017 Phased CVA	2018 Phased CVA	2019 Phased CVA	
<i>Taxable</i>					
Residential	42,252,426,190	43,603,611,524	45,240,747,203	46,877,880,220	48,515,013,074
Farm	1,591,797,789	1,753,281,260	1,976,142,587	2,199,003,701	2,421,864,835
Managed Forest	10,938,262	11,773,747	12,840,739	13,907,719	14,974,700
New Multi-Residential	126,684,138	131,290,298	137,687,680	144,085,061	150,482,442
Multi-Residential	1,251,666,894	1,257,417,550	1,302,167,148	1,346,916,747	1,391,666,340
Commercial	6,130,123,061	6,292,410,243	6,623,548,330	6,954,686,379	7,285,824,308
Industrial	806,194,157	778,006,166	808,952,273	839,898,339	870,844,399
Landfill	6,353,700	3,394,075	3,465,350	3,536,625	3,607,900
Pipeline	222,561,681	228,626,513	234,691,343	240,756,173	246,821,000
Sub-Total Taxable	52,398,745,872	54,059,811,376	56,340,242,653	58,620,670,964	60,901,098,998
<i>Payment in Lieu</i>					
Residential	25,703,160	26,964,921	29,502,283	32,039,644	34,577,004
Farm	372,000	401,750	431,500	461,250	491,000
Commercial	585,385,002	592,434,978	608,666,087	624,897,194	641,128,299
Industrial	9,005,948	10,155,211	11,375,076	12,594,937	13,814,800
Landfill	816,000	1,033,775	1,257,850	1,481,925	1,706,000
Sub-Total PIL	621,282,110	630,990,635	651,232,796	671,474,950	691,717,103
Total (Taxable + PIL)	53,020,027,982	54,690,802,011	56,991,475,449	59,292,145,914	61,592,816,101

Table 13
Summary of 2018 to 2019 Phase-In Change

Realty Tax Class	Phase Adjusted CVA		Change in Phased CVA	
	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	45,240,747,203	46,877,880,220	1,637,133,017	3.62%
Farm	1,976,142,587	2,199,003,701	222,861,114	11.28%
Managed Forest	12,840,739	13,907,719	1,066,980	8.31%
New Multi-Residential	137,687,680	144,085,061	6,397,381	4.65%
Multi-Residential	1,302,167,148	1,346,916,747	44,749,599	3.44%
Commercial	6,623,548,330	6,954,686,379	331,138,049	5.00%
Industrial	808,952,273	839,898,339	30,946,066	3.83%
Landfill	3,465,350	3,536,625	71,275	2.06%
Pipeline	234,691,343	240,756,173	6,064,830	2.58%
Sub-Total Taxable	56,340,242,653	58,620,670,964	2,280,428,311	4.05%
<i>Payment in Lieu</i>				
Residential	29,502,283	32,039,644	2,537,361	8.60%
Farm	431,500	461,250	29,750	6.89%
Commercial	608,666,087	624,897,194	16,231,107	2.67%
Industrial	11,375,076	12,594,937	1,219,861	10.72%
Landfill	1,257,850	1,481,925	224,075	17.81%
Sub-Total PIL	651,232,796	671,474,950	20,242,154	3.11%
Total (Taxable + PIL)	56,991,475,449	59,292,145,914	2,300,670,465	4.04%

Table 14
Summary of 2018 to 2019 Phase-In Change

Realty Tax Class	Phase Adjusted CVA		Change in Phased CVA	
	2018 Revised	2019 Returned	\$	%
Fort Erie	3,695,244,080	3,781,255,244	86,011,164	2.33%
Grimsby	4,304,891,690	4,562,453,495	257,561,805	5.98%
Lincoln	3,603,468,239	3,794,236,761	190,768,522	5.29%
Niagara Falls	10,970,556,208	11,423,994,476	453,438,268	4.13%
Niagara-on-the-Lake	5,041,890,222	5,294,306,150	252,415,928	5.01%
Pelham	2,609,030,217	2,698,198,822	89,168,605	3.42%
Port Colborne	1,830,776,114	1,883,392,977	52,616,863	2.87%
St. Catharines	14,356,077,009	14,860,665,217	504,588,208	3.51%
Thorold	2,259,087,290	2,327,497,177	68,409,887	3.03%
Wainfleet	1,028,851,431	1,086,036,827	57,185,396	5.56%
Welland	4,585,317,044	4,719,658,916	134,341,872	2.93%
West Lincoln	2,055,053,109	2,188,974,902	133,921,793	6.52%
Niagara Region (Tax Only)	56,340,242,653	58,620,670,964	2,280,428,311	4.05%

Cycle Progression to Date

Table 15 has been included to give the reader a more detailed picture as to the market value changes that have been applied as of return of the roll for 2019 and the remaining assessment increases yet to be phased in. As can be seen, the total number of assessment dollars increase each year and while this will have an impact on the municipality's tax rate, it is not assessment growth. Growth and loss materialize independent of these anticipated changes.

Table 15
Phase-In Cycle Progression

Realty Tax Class	Phase-In Base (Jan. 1, 2012)	Decreases Flowed Through	Increases to Date (2017 - 2019)	Outstanding Mitigation	Destination CVA (Jan. 1, 2016)
<i>Taxable</i>					
Residential	42,252,426,190	-285,950,603	4,911,404,633	1,637,132,854	48,515,013,074
Farm	1,591,797,789	-61,377,863	668,583,775	222,861,134	2,421,864,835
Managed Forest	10,938,262	-231,504	3,200,961	1,066,981	14,974,700
New Multi-Residential	126,684,138	-1,791,222	19,192,145	6,397,381	150,482,442
Multi-Residential	1,251,666,894	-38,998,949	134,248,802	44,749,593	1,391,666,340
Commercial	6,130,123,061	-168,851,017	993,414,335	331,137,929	7,285,824,308
Industrial	806,194,157	-59,134,096	92,838,278	30,946,060	870,844,399
Landfill	6,353,700	-3,030,900	213,825	71,275	3,607,900
Pipeline	222,561,681	0	18,194,492	6,064,827	246,821,000
Sub-Total Taxable	52,398,745,872	-619,366,154	6,841,291,246	2,280,428,034	60,901,098,998
<i>Payment in Lieu</i>					
Residential	25,703,160	-1,275,600	7,612,084	2,537,360	34,577,004
Farm	372,000	0	89,250	29,750	491,000
Commercial	585,385,002	-9,181,135	48,693,327	16,231,105	641,128,299
Industrial	9,005,948	-70,600	3,659,589	1,219,863	13,814,800
Landfill	816,000	-6,300	672,225	224,075	1,706,000
Sub-Total PIL	621,282,110	-10,533,635	60,726,475	20,242,153	691,717,103
Total (Tax + PIL)	53,020,027,982	-629,899,789	6,902,017,721	2,300,670,187	61,592,816,101

PART THREE: REASSESSMENT AND PHASE-IN RELATED TAXATION IMPACTS

Revenue Neutral Tax Rates (NTR)

An increase in a property's assessment does not necessarily result in increased taxes, nor does a reduction in assessment automatically translate into lower taxes. In order to measure the true tax impact associated with changes in market value (reassessment), revenue neutral tax rates, or notional tax rates (NTR) as they are also commonly known, must be calculated.

Simply put, revenue neutral tax rates are the rates that would be set to raise the 2018 final annualized tax from the newly updated assessment roll as returned for 2019 taxation. They are employed to isolate the effects of reassessment from impacts that could result from other budgetary or tax policy changes.

Table 16 demonstrates the relationship between the municipality's actual 2018 tax rates and revenue neutral rates. Also included in this table are the revenue sub-totals and totals associated with the application of each rate set against their respective assessment data. These are critical figures as they highlight the importance of restating tax rates in order to compensate for changes in assessment that are purely related to reassessment and/or phase-in. This is even more important in cases where the notional tax rates increase.

2019 Start Ratios

For the purposes of this report, MTE has calculated start ratios based on the municipality's tax rate relationships for 2018. In most cases the current year's start ratios will match the prior year's by-lawed ratios, however, adjustments can be required where optional classes and or levy restriction applies. While levy restriction does apply to the Region's multi-Residential class, MTE confirmed that no adjustment was required to the start ratio for that, or any other class for 2019.

PIL Assessment and Revenue

For municipalities that do not include the assessment and revenues associated with Payment in Lieu of Tax (PIL) properties in the calculation of tax rates, the amount of PIL revenue is dictated by, or dependant on the rates calculated using the municipality's taxable assessment base. As such, municipalities that have directed MTE to calculate their rates exclusive of PIL revenue and assessment will see that their revenue neutral levy amounts balance with the *Taxable Sub-Total* for 2018. In contrast, where a municipality includes both taxable and PIL revenue and assessment in their tax rate calculations, the total levy (Taxable + PIL) will balance on a year-over-year basis. Where the former approach has been applied, and a loss of PIL revenue is anticipated, the municipality may wish to consider an alternate calculation protocol.

Tax Shifts Using Revenue Neutral Rates

Although the rates calculated and shown in Table 16 are revenue neutral, changes in assessment will inevitably result in shifts between individual properties and groups of properties. The inter-class shifts of the Regional general levy are documented in Table 17.

Percent Share / Balance of Taxation

As taxes shift among properties, classes and other groupings, the balance of taxation changes. Table 18 shows how the share of the Regional levy each class carries based on the 2018 roll as finally revised and the 2019 roll as returned.

Table 16
Starting Ratios and Revenue Neutral (Notional) Tax Rates

Realty Tax Class	Tax Ratios			General Levy Rates		
	2018 Actual	2019 Start	% Change	2018 Actual	2019 Notional	% Change
Residential	1.000000	1.000000	0.00%	0.00567079	0.00545717	-3.77%
Farm	0.250000	0.250000	0.00%	0.00141770	0.00136429	-3.77%
Managed Forest	0.250000	0.250000	0.00%	0.00141770	0.00136429	-3.77%
New Multi-Residential	1.000000	1.000000	0.00%	0.00567079	0.00545717	-3.77%
Multi-Residential	1.970000	1.970000	0.00%	0.01117146	0.01075062	-3.77%
Commercial	1.734900	1.734900	0.00%	0.00983825	0.00946764	-3.77%
Industrial	2.630000	2.630000	0.00%	0.01491418	0.01435236	-3.77%
Landfill	2.940261	2.940261	0.00%	0.01667360	0.01604550	-3.77%
Pipeline	1.702100	1.702100	0.00%	0.00965225	0.00928865	-3.77%

Table 17
Reassessment Related Inter-Class Tax Shifts
(Regional General Levy)

Realty Tax Class	Regional General Levy		Inter-Class Shifts	
	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$256,369,618	\$255,643,196	-\$726,422	-0.28%
Farm	\$2,801,577	\$3,000,078	\$198,501	7.09%
Managed Forest	\$18,205	\$18,975	\$770	4.23%
New Multi-Residential	\$780,797	\$786,297	\$5,500	0.70%
Multi-Residential	\$14,547,107	\$14,480,189	-\$66,918	-0.46%
Commercial	\$64,130,454	\$64,796,932	\$666,478	1.04%
Industrial	\$11,482,587	\$11,434,577	-\$48,010	-0.42%
Landfill	\$57,780	\$56,746	-\$1,034	-1.79%
Pipeline	\$2,265,299	\$2,236,301	-\$28,998	-1.28%
Sub-Total Taxable	\$352,453,424	\$352,453,291	-\$133	0.00%
<i>Payment in Lieu</i>				
Residential	\$167,300	\$174,847	\$7,547	4.51%
Farm	\$612	\$629	\$17	2.78%
Commercial	\$5,947,061	\$5,873,532	-\$73,529	-1.24%
Industrial	\$156,900	\$167,080	\$10,180	6.49%
Landfill	\$20,973	\$23,778	\$2,805	13.37%
Sub-Total PIL	\$6,292,846	\$6,239,866	-\$52,980	-0.84%
Total (Taxable + PIL)	\$358,746,270	\$358,693,157	-\$53,113	-0.01%

Table 18
Reassessment Related Change in Proportional Share of Tax
(Regional General Levy)

Realty Tax Class	Share of Regional General Levy		%
	2018	2019	
<i>Taxable</i>			
Residential	71.46%	71.27%	-0.27%
Farm	0.78%	0.84%	7.10%
Managed Forest	0.01%	0.01%	4.25%
New Multi-Residential	0.22%	0.22%	0.72%
Multi-Residential	4.05%	4.04%	-0.45%
Commercial	17.88%	18.06%	1.05%
Industrial	3.20%	3.19%	-0.40%
Landfill	0.02%	0.02%	-1.78%
Pipeline	0.63%	0.62%	-1.27%
Sub-Total Taxable	98.25%	98.26%	0.01%
<i>Payment in Lieu</i>			
Residential	0.05%	0.05%	4.53%
Farm	0.00%	0.00%	2.79%
Commercial	1.66%	1.64%	-1.22%
Industrial	0.04%	0.05%	6.50%
Landfill	0.01%	0.01%	13.39%
Sub-Total PIL	1.75%	1.74%	-0.83%
Total (Taxable + PIL)	100.00%	100.00%	0.00%

In addition to shifting among property classes, the regional levy will also shift among and within local municipalities based on the differential rates of change being experienced Region-wide. Table 19 documents these shifts of the regional notional levy at the local level.

Table 20 plots the rate of phase-in change for each local municipality in ascending order and also includes the rate of inter-municipal levy shift. As can be seen, those municipalities with overall phase-in change rates that fall below the Region-wide level may expect negative tax shifts. Those experiencing higher rates of change can expect their proportional share of the regional levy to increase on a year-over-year basis.

Table 19
Reassessment Related Regional Inter-Municipal Tax Shifts

Local Municipality	Regional General Levy		Inter-Municipal Shifts	
	2018 As Revised	2019 Notional	\$	%
Fort Erie	\$22,428,328	\$22,072,979	-\$355,349	-1.58%
Grimsby	\$25,883,857	\$26,414,076	\$530,219	2.05%
Lincoln	\$20,443,857	\$20,591,427	\$147,570	0.72%
Niagara Falls	\$74,209,801	\$74,370,381	\$160,580	0.22%
Niagara-on-the-Lake	\$30,082,399	\$30,313,217	\$230,818	0.77%
Pelham	\$14,718,064	\$14,611,236	-\$106,828	-0.73%
Port Colborne	\$11,599,092	\$11,484,857	-\$114,235	-0.98%
St. Catharines	\$93,802,595	\$93,556,655	-\$245,940	-0.26%
Thorold	\$14,142,691	\$14,018,740	-\$123,951	-0.88%
Wainfleet	\$5,281,328	\$5,309,361	\$28,033	0.53%
Welland	\$29,032,299	\$28,758,816	-\$273,483	-0.94%
West Lincoln	\$10,829,113	\$10,951,546	\$122,433	1.13%
Niagara Region	\$352,453,424	\$352,453,291	-\$133	0.00%

Table 20
Inter-Municipal Tax Shifts and Rate of Phase-In Change

Local Municipality	Rate of Phase-In Change	Inter-Municipal Shifts	
		\$	%
Fort Erie	2.33%	-\$355,349	-1.58%
Port Colborne	2.87%	-\$114,235	-0.98%
Welland	2.93%	-\$273,483	-0.94%
Thorold	3.03%	-\$123,951	-0.88%
Pelham	3.42%	-\$106,828	-0.73%
St. Catharines	3.51%	-\$245,940	-0.26%
Niagara Region	4.05%	-\$133	0.00%
Niagara Falls	4.13%	\$160,580	0.22%
Niagara-on-the-Lake	5.01%	\$230,818	0.77%
Lincoln	5.29%	\$147,570	0.72%
Wainfleet	5.56%	\$28,033	0.53%
Grimsby	5.98%	\$530,219	2.05%
West Lincoln	6.52%	\$122,433	1.13%

The rate of tax shift will generally follow the rate of phase-in change a property, or group of properties is experiencing relative to the overall rate of change for the pool of assessment against which the taxes are levied.

This is true at the inter-municipal level as shown in Table 19, but it is also true at the class and property level. Simply put, any municipality, class or other group of properties subject to a rate of phase-in change around 4.05% would likely carry a similar share of the Regional levy in 2019 in 2018. Representative property groupings (class, municipality, ward, etc.) experiencing higher rates of change will attract a greater share of the overall levy; and vice-versa for those increasing at rates below the aggregate.

Local General Levies

As with the regional levy, local levies will shift amongst classes and taxpayers. Table 21 displays the inter-class shifts of the local general on a Region-wide basis.

Table 21
Reassessment Related Inter-Class Tax Shifts
(All Local General Levies)

Realty Tax Class	Local General Levies		Inter-Class Shifts	
	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$225,755,794	\$225,170,702	-\$585,092	-0.26%
Farm	\$1,999,035	\$2,127,559	\$128,524	6.43%
Managed Forest	\$16,112	\$16,706	\$594	3.69%
New Multi-Residential	\$787,488	\$796,596	\$9,108	1.16%
Multi-Residential	\$14,118,786	\$14,073,822	-\$44,964	-0.32%
Commercial	\$54,192,228	\$54,745,931	\$553,703	1.02%
Industrial	\$10,794,723	\$10,754,106	-\$40,617	-0.38%
Landfill	\$49,225	\$48,926	-\$299	-0.61%
Pipeline	\$2,007,012	\$1,986,014	-\$20,998	-1.05%
Sub-Total Taxable	\$309,720,403	\$309,720,362	-\$41	0.00%
<i>Payment in Lieu</i>				
Residential	\$134,378	\$140,381	\$6,003	4.47%
Farm	\$632	\$656	\$24	3.80%
Commercial	\$4,844,650	\$4,768,925	-\$75,725	-1.56%
Industrial	\$131,921	\$139,634	\$7,713	5.85%
Landfill	\$23,950	\$28,149	\$4,199	17.53%
Sub-Total PIL	\$5,135,531	\$5,077,745	-\$57,786	-1.13%
Total (Taxable + PIL)	\$314,855,934	\$314,798,107	-\$57,827	-0.02%

Table 22 considers how the combined (Regional + local) general levies are shifting among the property classes. The local levy amounts used in this section, as well as the underlying municipal specific notional tax rates are further documented in the Local Results Addenda attached to this study.

Table 22
Reassessment Related Inter-Class Tax Shifts
(Combined Local and Regional General Levies)

Realty Tax Class	Combined (UT + LT) General Levies		Inter-Class Shift	
	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$482,125,412	\$480,813,898	-\$1,311,514	-0.27%
Farm	\$4,800,612	\$5,127,637	\$327,025	6.81%
Managed Forest	\$34,317	\$35,681	\$1,364	3.97%
New Multi-Residential	\$1,568,285	\$1,582,893	\$14,608	0.93%
Multi-Residential	\$28,665,893	\$28,554,011	-\$111,882	-0.39%
Commercial	\$118,322,682	\$119,542,863	\$1,220,181	1.03%
Industrial	\$22,277,310	\$22,188,683	-\$88,627	-0.40%
Landfill	\$107,005	\$105,672	-\$1,333	-1.25%
Pipeline	\$4,272,311	\$4,222,315	-\$49,996	-1.17%
Sub-Total Taxable	\$662,173,827	\$662,173,653	-\$174	0.00%
<i>Payment in Lieu</i>				
Residential	\$301,678	\$315,228	\$13,550	4.49%
Farm	\$1,244	\$1,285	\$41	3.30%
Commercial	\$10,791,711	\$10,642,457	-\$149,254	-1.38%
Industrial	\$288,821	\$306,714	\$17,893	6.20%
Landfill	\$44,923	\$51,927	\$7,004	15.59%
Sub-Total PIL	\$11,428,377	\$11,317,611	-\$110,766	-0.97%
Total (Taxable + PIL)	\$673,602,204	\$673,491,264	-\$110,940	-0.02%

Future Year Tax Trend Projections

As soon as the assessment roll is returned for a taxation year it begins to change in response to growth, value adjustments, corrections, etc. In light of this constant change as well as not knowing what the revenue needs of the municipality will be any given point in the future, it is not possible to predict actual future year tax outcomes with any degree of reliability. What we can do however, is gain an understanding as to how we can expect taxes to change and shift over the coming years as the current assessment and phase-in cycle progresses. Tables 23 and 24 utilize a constant revenue target and the current assessment roll to demonstrate how taxes may shift amongst the property classes between now and 2020. This approach controls for future growth and revenue (budgetary) increases to consider the pure impacts of reassessment and phase-in.

Table 23
Multi-Year Tax Trend
(General Levy / Revenue Neutral / Status Quo Policy)

Realty Tax Class	2018 Revised	Share	2019 Notional	Share	2020 Projected	Share
<i>Taxable</i>						
Residential	\$256,369,618	71.46%	\$255,643,196	71.27%	\$254,969,514	71.09%
Farm	\$2,801,577	0.78%	\$3,000,078	0.84%	\$3,184,196	0.89%
Managed Forest	\$18,205	0.01%	\$18,975	0.01%	\$19,688	0.01%
New Multi-Residential	\$780,797	0.22%	\$786,297	0.22%	\$791,396	0.22%
Multi-Residential	\$14,547,107	4.05%	\$14,480,189	4.04%	\$14,418,151	4.02%
Commercial	\$64,130,454	17.88%	\$64,796,932	18.06%	\$65,415,030	18.24%
Industrial	\$11,482,587	3.20%	\$11,434,577	3.19%	\$11,390,056	3.18%
Landfill	\$57,780	0.02%	\$56,746	0.02%	\$55,789	0.02%
Pipeline	\$2,265,299	0.63%	\$2,236,301	0.62%	\$2,209,408	0.62%
Sub-Total Taxable	\$352,453,424	98.25%	\$352,453,291	98.26%	\$352,453,228	98.27%
<i>Payment in Lieu</i>						
Residential	\$167,300	0.05%	\$174,847	0.05%	\$181,838	0.05%
Farm	\$612	0.00%	\$629	0.00%	\$646	0.00%
Commercial	\$5,947,061	1.66%	\$5,873,532	1.64%	\$5,805,348	1.62%
Industrial	\$156,900	0.04%	\$167,080	0.05%	\$176,522	0.05%
Landfill	\$20,973	0.01%	\$23,778	0.01%	\$26,380	0.01%
Sub-Total PIL	\$6,292,846	1.75%	\$6,239,866	1.74%	\$6,190,734	1.73%
Total (Tax + PIL)	\$358,746,270	100.00%	\$358,693,157	100.00%	\$358,643,962	100.00%

Table 24
Multi-Year Reassessment / Phase-In Related Tax Shifts
 (General Levy / Revenue Neutral / Status Quo Policy)

Realty Tax Class	2018 - 2019		2019 - 2020	
<i>Taxable</i>				
Residential	-\$726,422	-0.28%	-\$673,682	-0.26%
Farm	\$198,501	7.09%	\$184,118	6.14%
Managed Forest	\$770	4.23%	\$713	3.76%
New Multi-Residential	\$5,500	0.70%	\$5,099	0.65%
Multi-Residential	-\$66,918	-0.46%	-\$62,038	-0.43%
Commercial	\$666,478	1.04%	\$618,098	0.95%
Industrial	-\$48,010	-0.42%	-\$44,521	-0.39%
Landfill	-\$1,034	-1.79%	-\$957	-1.69%
Pipeline	-\$28,998	-1.28%	-\$26,893	-1.20%
Sub-Total Taxable	-\$133	0.00%	-\$63	0.00%
<i>Payment in Lieu</i>				
Residential	\$7,547	4.51%	\$6,991	4.00%
Farm	\$17	2.78%	\$17	2.70%
Commercial	-\$73,529	-1.24%	-\$68,184	-1.16%
Industrial	\$10,180	6.49%	\$9,442	5.65%
Landfill	\$2,805	13.37%	\$2,602	10.94%
Sub-Total PIL	-\$52,980	-0.84%	-\$49,132	-0.79%
Total (Taxable + PIL)	-\$53,113	-0.01%	-\$49,195	-0.01%

Taxation Impacts/Implications of Assessment Phase-In

Although the assessment phase-in program does not place any specific limitations on year-over-year tax change for individual properties, it does necessarily have consequences for final tax outcomes. The most obvious tax impact of the phase-in program is the benefit to increasing properties, which will not be taxed on their full CVA values until 2020. The tax implications for decreasing properties are not quite as direct, but they are material and measurable.

While there is no delay or phase-in of assessment decreases, the reduced availability of CVA against which to levy taxes in the first three years of a cycle results in the tax rates for those years being higher than would otherwise be the case if the phase-in did not exist. That is, if the full CVA for all properties were made available for 2019 taxation, and revenue requirements were held constant, the tax rates set would be lower. Under such a scenario, all decreasing properties would pay less, while most increasing properties would pay more.

Table 25 considers the difference in tax levy distribution among classes with and without an assessment phase-in program.

Table 25
Tax Mitigation Effects of Assessment Phase-In Program by Class
(Regional General Levy)

Realty Tax Class	2019 Regional General Levy		Tax Impacts of Assessment Phase-In	
	(Full CVA)	(Phased CVA)	\$	%
<i>Taxable</i>				
Residential	\$254,969,514	\$255,643,196	\$673,682	0.26%
Farm	\$3,184,196	\$3,000,078	-\$184,118	-5.78%
Managed Forest	\$19,688	\$18,975	-\$713	-3.62%
New Multi-Residential	\$791,396	\$786,297	-\$5,099	-0.64%
Multi-Residential	\$14,418,151	\$14,480,189	\$62,038	0.43%
Commercial	\$65,415,030	\$64,796,932	-\$618,098	-0.94%
Industrial	\$11,390,056	\$11,434,577	\$44,521	0.39%
Landfill	\$55,789	\$56,746	\$957	1.72%
Pipeline	\$2,209,408	\$2,236,301	\$26,893	1.22%
Sub-Total Taxable	\$352,453,228	\$352,453,291	\$63	0.00%
<i>Payment in Lieu</i>				
Residential	\$181,838	\$174,847	-\$6,991	-3.84%
Farm	\$646	\$629	-\$17	-2.63%
Commercial	\$5,805,348	\$5,873,532	\$68,184	1.17%
Industrial	\$176,522	\$167,080	-\$9,442	-5.35%
Landfill	\$26,380	\$23,778	-\$2,602	-9.86%
Sub-Total PIL	\$6,190,734	\$6,239,866	\$49,132	0.79%
Total (Taxable + PIL)	\$358,643,962	\$358,693,157	\$49,195	0.01%

Increases and Decreases

While the phase-in program should not have an overall impact on the municipality's taxable levy in any year, that revenue neutrality will not extend to individual taxpayers. As the assessment phase-in program ultimately "delays" increases in CVA, it also delays the movement of tax outcomes. Those with assessment decreases will pay more than they otherwise would if everyone's full unmitigated CVA's were available to be taxed in 2019, and those with assessment increases being phased-in benefit from paying taxes on an assessed value that is less than their full market value.

As these two groups are being treated differently under the system, the relationship between them, and the relationship between the taxes they would be liable for with or without the assessment phase-in program is an important dynamic to be understood.

Measuring Other Assessment and Taxation Shifts

In addition to considering the broad, class and municipal level impacts that can be expected for 2019 taxation, it is also important to understand how reassessment and the assessment phase-in program is going to affect more specific groups of taxpayers.

Business, Non-Business and Public Sector Revenue

Although some groups or categories of taxpayers are not specifically defined by the *Municipal or Assessment Acts*, it is possible to make distinctions between various types of taxpayers to support informative, interesting and useful analysis.

For many, the distinction between revenue that comes from non-business, business and public sector property owners is of significant interest. Figures 1 through 3 have been prepared to show how the relative burden of assessment and CVA tax may change, and/or be influenced by reassessment and the assessment phase-in program. For the purposes of this report, these categories incorporate the following assessment elements:

Residential	Taxable Residential
Multi-Residential	Taxable Multi-Residential
Business	Taxable Commercial, Industrial, and Pipeline Classes
PIL	Properties from any class, which are subject to a Payment in Lieu, or Payment on Account of taxes

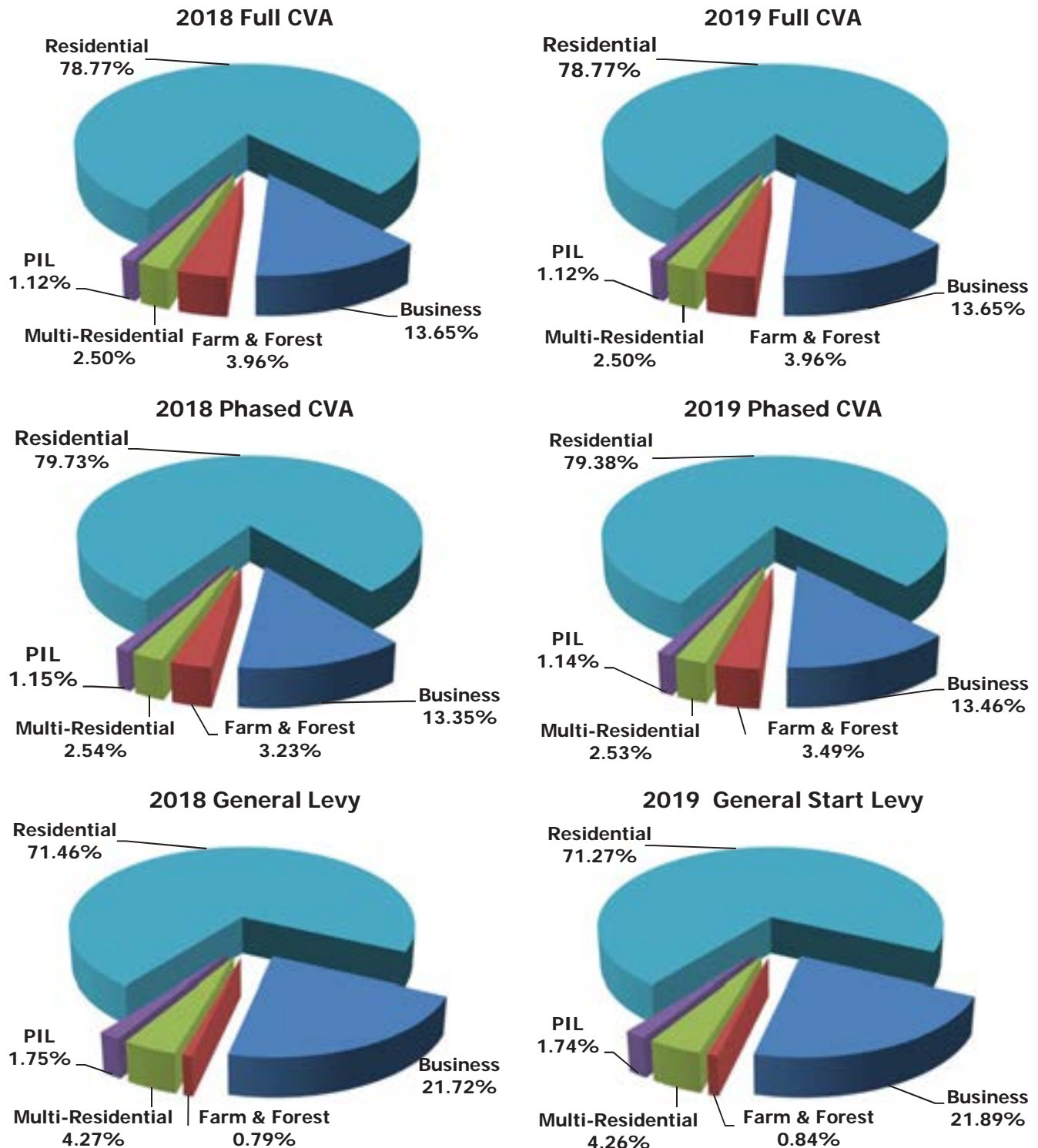
Typical Properties

It is also important to consider the impacts of reassessment at the property level. While the specific changes experienced by each ratepayer can vary widely, considering how the assessment and tax changes will materialize for a typical or average property can be very helpful in placing the broader change trends in an understandable perspective.

To this end, we have prepared Tables 26-A through F to illustrate the potential impact on various "typical" taxable properties within the jurisdiction, including:

- Single Detached Residential;
- All Residential;
- Multi-Residential;
- Commercial Occupied (CT/XT); and
- Industrial Occupied (IT/JT).

Figures 1 through 3 Distribution of Assessment and General Levy Among Broad Taxpayer Groups



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Table 26-A
Reassessment Related CVA and CVA Tax Change: Single Detached Typical Residential Properties

Municipality	Average CVA		2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related Tax Shift	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined	
Fort Erie	211,537	216,653	2.42%	\$1,200	\$1,448	\$2,648	\$1,182	\$1,450	\$2,632	-\$16 -0.60%
Grimsby	397,390	419,933	5.67%	\$2,254	\$989	\$3,243	\$2,292	\$986	\$3,278	\$35 1.08%
Lincoln	362,709	377,697	4.13%	\$2,057	\$1,546	\$3,603	\$2,061	\$1,539	\$3,600	-\$3 -0.08%
Niagara Falls	254,741	265,133	4.08%	\$1,445	\$1,157	\$2,602	\$1,447	\$1,156	\$2,603	\$1 0.04%
Niagara-on-the-Lake	486,509	506,367	4.08%	\$2,759	\$1,012	\$3,771	\$2,763	\$1,006	\$3,769	-\$2 -0.05%
Pelham	370,931	381,082	2.74%	\$2,103	\$1,829	\$3,932	\$2,080	\$1,821	\$3,901	-\$31 -0.79%
Port Colborne	186,162	190,504	2.33%	\$1,056	\$1,570	\$2,626	\$1,040	\$1,561	\$2,601	-\$25 -0.95%
St. Catharines	255,711	263,847	3.18%	\$1,450	\$1,378	\$2,828	\$1,440	\$1,372	\$2,812	-\$16 -0.57%
Thorold	243,077	249,292	2.56%	\$1,378	\$1,424	\$2,802	\$1,360	\$1,418	\$2,778	-\$24 -0.86%
Wainfleet	278,243	290,453	4.39%	\$1,578	\$1,616	\$3,194	\$1,585	\$1,615	\$3,200	\$6 0.19%
Welland	210,473	216,112	2.68%	\$1,194	\$1,630	\$2,824	\$1,179	\$1,626	\$2,805	-\$19 -0.67%
West Lincoln	345,520	361,900	4.74%	\$1,959	\$1,192	\$3,151	\$1,975	\$1,188	\$3,163	\$12 0.38%
Region Average	271,856	281,548	3.57%	\$1,542	\$1,401	\$2,943	\$1,536	\$1,400	\$2,936	-\$7 -0.24%
Region Median	242,500	251,000	3.51%	\$1,375	\$1,250	\$2,625	\$1,370	\$1,249	\$2,619	-\$6 -0.23%

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**Table 26-B
Reassessment Related CVA and CVA Tax Change: Other Typical Residential Properties**

Municipality	Average CVA			2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related Tax Shift	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined		
Fort Erie	197,139	201,230	2.08%	\$1,118	\$1,350	\$2,468	\$1,098	\$1,347	\$2,445	-\$23	-0.93%
Grimsby	296,595	313,758	5.79%	\$1,682	\$738	\$2,420	\$1,712	\$737	\$2,449	\$29	1.20%
Lincoln	307,378	324,702	5.64%	\$1,743	\$1,311	\$3,054	\$1,772	\$1,323	\$3,095	\$41	1.34%
Niagara Falls	207,735	215,305	3.64%	\$1,178	\$944	\$2,122	\$1,175	\$939	\$2,114	-\$8	-0.38%
Niagara-on-the-Lake	398,655	414,545	3.99%	\$2,261	\$829	\$3,090	\$2,262	\$823	\$3,085	-\$5	-0.16%
Pelham	254,314	264,888	4.16%	\$1,442	\$1,254	\$2,696	\$1,446	\$1,266	\$2,712	\$16	0.59%
Port Colborne	220,320	227,490	3.25%	\$1,249	\$1,858	\$3,107	\$1,241	\$1,864	\$3,105	-\$2	-0.06%
St. Catharines	216,114	222,224	2.83%	\$1,226	\$1,165	\$2,391	\$1,213	\$1,155	\$2,368	-\$23	-0.96%
Thorold	169,763	175,851	3.59%	\$963	\$995	\$1,958	\$960	\$1,000	\$1,960	\$2	0.10%
Wainfleet	229,091	237,228	3.55%	\$1,299	\$1,331	\$2,630	\$1,295	\$1,319	\$2,614	-\$16	-0.61%
Welland	178,504	184,404	3.31%	\$1,012	\$1,383	\$2,395	\$1,006	\$1,387	\$2,393	-\$2	-0.08%
West Lincoln	215,177	226,676	5.34%	\$1,220	\$742	\$1,962	\$1,237	\$744	\$1,981	\$19	0.97%
Region Average	231,577	240,288	3.76%	\$1,313	\$1,193	\$2,506	\$1,311	\$1,195	\$2,506	\$0	0.00%
Region Median	191,000	197,750	3.53%	\$1,083	\$984	\$2,067	\$1,079	\$984	\$2,063	-\$4	-0.19%

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**Table 26-C
Reassessment Related CVA and CVA Tax Change: All Typical Residential Properties**

Municipality	Average CVA			2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related Tax Shift	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined		
Fort Erie	206,438	211,190	2.30%	\$1,171	\$1,413	\$2,584	\$1,153	\$1,414	\$2,567	-\$17	-0.66%
Grimsby	359,364	379,877	5.71%	\$2,038	\$895	\$2,933	\$2,073	\$892	\$2,965	\$32	1.09%
Lincoln	339,761	355,718	4.70%	\$1,927	\$1,449	\$3,376	\$1,941	\$1,449	\$3,390	\$14	0.41%
Niagara Falls	242,743	252,415	3.98%	\$1,377	\$1,103	\$2,480	\$1,377	\$1,101	\$2,478	-\$2	-0.08%
Niagara-on-the-Lake	451,899	470,194	4.05%	\$2,563	\$940	\$3,503	\$2,566	\$934	\$3,500	-\$3	-0.09%
Pelham	340,072	350,335	3.02%	\$1,928	\$1,677	\$3,605	\$1,912	\$1,674	\$3,586	-\$19	-0.53%
Port Colborne	195,705	200,837	2.62%	\$1,110	\$1,650	\$2,760	\$1,096	\$1,646	\$2,742	-\$18	-0.65%
St. Catharines	244,050	251,589	3.09%	\$1,384	\$1,315	\$2,699	\$1,373	\$1,308	\$2,681	-\$18	-0.67%
Thorold	216,895	223,065	2.84%	\$1,230	\$1,271	\$2,501	\$1,217	\$1,269	\$2,486	-\$15	-0.60%
Wainfleet	250,430	260,335	3.96%	\$1,420	\$1,455	\$2,875	\$1,421	\$1,447	\$2,868	-\$7	-0.24%
Welland	202,531	208,235	2.82%	\$1,149	\$1,569	\$2,718	\$1,136	\$1,567	\$2,703	-\$15	-0.55%
West Lincoln	288,455	302,699	4.94%	\$1,636	\$995	\$2,631	\$1,652	\$994	\$2,646	\$15	0.57%
Region Average	259,215	268,598	3.62%	\$1,470	\$1,336	\$2,806	\$1,466	\$1,336	\$2,802	-\$4	-0.14%
Region Median	226,500	234,500	3.53%	\$1,284	\$1,167	\$2,451	\$1,280	\$1,166	\$2,446	-\$5	-0.20%



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**Table 26-D
Reassessment Related CVA and CVA Tax Change: Typical Occupied Multi-Residential Properties**

Municipality	Average CVA			2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related Tax Shift	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined		
Fort Erie	1,353,474	1,364,071	0.78%	\$15,120	\$18,254	\$33,374	\$14,665	\$17,989	\$32,654	-\$720	-2.16%
Grimsby	2,078,250	2,138,583	2.90%	\$23,217	\$10,194	\$33,411	\$22,991	\$9,892	\$32,883	-\$528	-1.58%
Lincoln	1,530,158	1,588,225	3.79%	\$17,094	\$12,852	\$29,946	\$17,074	\$12,746	\$29,820	-\$126	-0.42%
Niagara Falls	2,427,686	2,543,287	4.76%	\$27,121	\$21,723	\$48,844	\$27,342	\$21,853	\$49,195	\$351	0.72%
Niagara-on-the-Lake	7,053,775	7,235,412	2.58%	\$78,801	\$28,903	\$107,704	\$77,785	\$28,313	\$106,098	-\$1,606	-1.49%
Pelham	1,589,273	1,598,864	0.60%	\$17,754	\$15,435	\$33,189	\$17,189	\$15,052	\$32,241	-\$948	-2.86%
Port Colborne	1,168,530	1,172,780	0.36%	\$13,054	\$19,408	\$32,462	\$12,608	\$18,932	\$31,540	-\$922	-2.84%
St. Catharines	3,118,202	3,239,842	3.90%	\$34,835	\$33,101	\$67,936	\$34,830	\$33,184	\$68,014	\$78	0.11%
Thorold	1,117,886	1,139,586	1.94%	\$12,488	\$12,902	\$25,390	\$12,251	\$12,769	\$25,020	-\$370	-1.46%
Wainfleet	456,500	456,750	0.05%	\$5,100	\$5,223	\$10,323	\$4,910	\$5,003	\$9,913	-\$410	-3.97%
Welland	2,164,489	2,190,994	1.22%	\$24,181	\$33,025	\$57,206	\$23,555	\$32,476	\$56,031	-\$1,175	-2.05%
West Lincoln	1,414,125	1,441,312	1.92%	\$15,798	\$9,613	\$25,411	\$15,495	\$9,323	\$24,818	-\$593	-2.33%
Region Average	2,390,928	2,472,484	3.41%	\$26,710	\$24,270	\$50,980	\$26,581	\$24,229	\$50,810	-\$170	-0.33%
Region Median	976,000	1,008,000	3.28%	\$10,903	\$9,907	\$20,810	\$10,837	\$9,878	\$20,715	-\$95	-0.46%

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Table 26-E
Reassessment Related CVA and CVA Tax Change: Typical Commercial Properties

Municipality	Average CVA			2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related Tax Shift	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined		
Fort Erie	339,270	347,778	2.51%	\$3,338	\$4,030	\$7,368	\$3,293	\$4,039	\$7,332	-\$36	-0.49%
Grimsby	898,814	974,014	8.37%	\$8,843	\$3,883	\$12,726	\$9,222	\$3,968	\$13,190	\$464	3.65%
Lincoln	532,601	553,157	3.86%	\$5,240	\$3,940	\$9,180	\$5,237	\$3,909	\$9,146	-\$34	-0.37%
Niagara Falls	1,332,387	1,391,071	4.40%	\$13,108	\$10,499	\$23,607	\$13,170	\$10,526	\$23,696	\$89	0.38%
Niagara-on-the-Lake	1,292,235	1,360,831	5.31%	\$12,713	\$4,663	\$17,376	\$12,884	\$4,690	\$17,574	\$198	1.14%
Pelham	419,447	434,160	3.51%	\$4,127	\$3,587	\$7,714	\$4,110	\$3,600	\$7,710	-\$4	-0.05%
Port Colborne	279,893	291,555	4.17%	\$2,754	\$4,094	\$6,848	\$2,760	\$4,145	\$6,905	\$57	0.83%
St. Catharines	678,800	711,485	4.82%	\$6,678	\$6,346	\$13,024	\$6,736	\$6,418	\$13,154	\$130	1.00%
Thorold	434,972	453,065	4.16%	\$4,279	\$4,421	\$8,700	\$4,289	\$4,471	\$8,760	\$60	0.69%
Wainfleet	174,727	186,274	6.61%	\$1,719	\$1,761	\$3,480	\$1,764	\$1,797	\$3,561	\$81	2.33%
Welland	436,801	454,005	3.94%	\$4,297	\$5,869	\$10,166	\$4,298	\$5,926	\$10,224	\$58	0.57%
West Lincoln	342,576	351,416	2.58%	\$3,370	\$2,051	\$5,421	\$3,327	\$2,002	\$5,329	-\$92	-1.70%
Region Average	744,604	779,103	4.63%	\$7,326	\$6,656	\$13,982	\$7,376	\$6,724	\$14,100	\$118	0.84%
Region Median	263,600	273,750	3.85%	\$2,593	\$2,356	\$4,949	\$2,592	\$2,362	\$4,954	\$5	0.10%

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Table 26-F
Reassessment Related CVA and CVA Tax Change: Typical Industrial Properties

Municipality	Average CVA			2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related Tax Shift	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined		
Fort Erie	744,268	747,878	0.49%	\$11,100	\$13,401	\$24,501	\$10,734	\$13,167	\$23,901	-\$600	-2.45%
Grimsby	1,557,132	1,664,868	6.92%	\$23,223	\$10,197	\$33,420	\$23,895	\$10,281	\$34,176	\$756	2.26%
Lincoln	817,578	838,193	2.52%	\$12,194	\$9,168	\$21,362	\$12,030	\$8,980	\$21,010	-\$352	-1.65%
Niagara Falls	823,446	851,884	3.45%	\$12,281	\$9,837	\$22,118	\$12,227	\$9,772	\$21,999	-\$119	-0.54%
Niagara-on-the-Lake	584,770	610,600	4.42%	\$8,721	\$3,199	\$11,920	\$8,764	\$3,190	\$11,954	\$34	0.29%
Pelham	174,331	185,559	6.44%	\$2,600	\$2,260	\$4,860	\$2,663	\$2,332	\$4,995	\$135	2.78%
Port Colborne	756,609	773,746	2.27%	\$11,284	\$16,777	\$28,061	\$11,105	\$16,675	\$27,780	-\$281	-1.00%
St. Catharines	728,746	748,640	2.73%	\$10,869	\$10,328	\$21,197	\$10,745	\$10,237	\$20,982	-\$215	-1.01%
Thorold	658,452	668,169	1.48%	\$9,820	\$10,146	\$19,966	\$9,590	\$9,995	\$19,585	-\$381	-1.91%
Wainfleet	242,133	250,103	3.29%	\$3,611	\$3,699	\$7,310	\$3,590	\$3,657	\$7,247	-\$63	-0.86%
Welland	825,962	845,782	2.40%	\$12,319	\$16,824	\$29,143	\$12,139	\$16,737	\$28,876	-\$267	-0.92%
West Lincoln	423,030	430,625	1.80%	\$6,309	\$3,839	\$10,148	\$6,180	\$3,719	\$9,899	-\$249	-2.45%
Region Average	725,196	746,101	2.88%	\$10,816	\$9,828	\$20,644	\$10,708	\$9,761	\$20,469	-\$175	-0.85%
Region Median	335,000	345,750	3.21%	\$4,996	\$4,540	\$9,536	\$4,962	\$4,523	\$9,485	-\$51	-0.53%



The farm property class in the Region of Niagara are marked by fairly strong market value updates and corresponding rates of phase-in change for 2019. On a Regional basis, the overall increase in Full CVA is approximately 52.15% for the current assessment cycle, which has translated into a 2019 phase-in change of 11.28%. These changes have a high rate of occurrence with 93.74% of farm properties increasing.

- Methodology changes and challenges at MPAC;
- Domestic (GTA) land crush issues; and even
- International weather and currency trends.

Although new notional / revenue neutral tax rates are calculated annually to compensate for the additional assessment being phased-in, these rates are calculated in response to municipal-wide assessment change and are not sensitive to any specific class of property. As such, varying rates of assessment change will inevitably result in shifts between individual properties and groups of properties. The inter-class shifts of the regional levy are previously documented in Table 17.

The rate of tax shift generally follows the rate of phase-in change a property, or group of properties is experiencing relative to the overall rate of change for the pool of assessment against which the taxes are levied. Table 27 plots the rate of phase-in change for each class in ascending order and also includes the rate of inter-class levy shift. As can be seen, those classes with overall phase-in change rates that fall below the Region-wide level may expect negative tax shifts.

Realty Tax Class	Rate of Phase-In Change	Inter-Class Shift	
		\$	%
Landfill	2.06%	-\$1,034	-1.79%
Pipeline	2.58%	-\$28,998	-1.28%
Multi-Residential	3.44%	-\$66,918	-0.46%
Residential	3.62%	-\$726,422	-0.28%
Industrial	3.83%	-\$48,010	-0.42%
Total (Taxable Only)	4.05%	-\$133	0.00%
New Multi-Residential	4.65%	\$5,500	0.70%
Commercial	5.00%	\$666,478	1.04%
Managed Forest	8.31%	\$770	4.23%
Farm	11.28%	\$198,501	7.09%



Those experiencing higher rates of change can expect their proportional share of the regional levy to increase on a year-over-year basis. This is also true at the inter-municipal and property level. Simply put, any municipality, class or other group of properties subject to a rate of phase-in change around 4.05% would likely carry a similar share of the regional levy in 2019 in 2018. Representative property groupings (class, municipality, ward, etc.) experiencing higher rates of change will attract a greater share of the overall levy; and vice-versa for those increasing at rates below the aggregate.

Farm Class vs. Whole Farm Property Tax

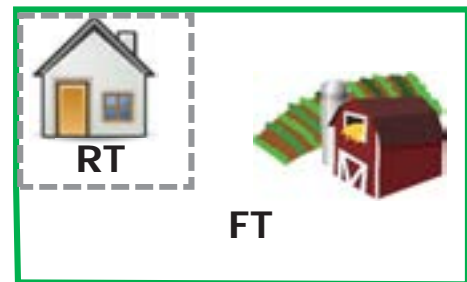
Although it is clear that farmland, captured by the farm property class is currently experiencing a relatively high rate of reassessment/phase-in change, this information is not sufficient to fully consider how bottom line taxes are changing for farms and farmers within the municipality.

The farm property class is considered to be a special tax incentive class and inclusion is based on a host of ownership, use and occupancy criteria. A large proportion of farms as understood outside the realm of property tax are made up of a farm class portion and portions that fall into other classes. It is important to consider these other elements in order to fully and accurately understand how farm taxes are changing.

The most common combination is a farm portion mixed with a residential portion associated with a farm house or other non-farm related improvements. Some farms also have elements classified as commercial or industrial based on use; this will be discussed later in the report.

This figure provides a simple illustration of a typical farm with a farmhouse. This property would fall under a single roll number, but would be comprised of two separate portions; a farm class portion and a residential portion.

For assessment purposes the underlying land is valued as farmland and the home and barn are valued on a replacement cost model derived from comparable farms.



One acre of land along with the farmhouse is classified and taxed as residential; the remainder of the land and all farm related out buildings are classified and taxed in the farm property class and subject to tax rates that are $\frac{1}{4}$ of those applicable to residential property.

As of roll return for 2019 taxation, there are 6,081 roll numbers (properties) in the Region that fall entirely or partially in the farm property class. The following tables have been prepared to give the reader a sense of these properties.

Table 28 shows that approximately 64% of all properties that make up the farm class have at least one other portion on the same roll number that is captured by another property class. Further, approximately 79% of farm property portions within the Region are part of multi-portion farms.

Table 28
Farm Class Rolls and Whole-Farm Property Portions

Local Municipality	Farm Class Rolls	Farm Property Portions	Farm Class Only			Multi-Portion Farms		
			Count	Share of Farm Rolls	Share of Farm Portions	Count	Share of Farm Rolls	Share of Farm Portions
Fort Erie	285	467	108	37.89%	23.13%	177	62.11%	76.87%
Grimsby	220	390	56	25.45%	14.36%	164	74.55%	85.64%
Lincoln	975	1,726	294	30.15%	17.03%	681	69.85%	82.97%
Niagara Falls	301	489	125	41.53%	25.56%	176	58.47%	74.44%
Niagara-on-the-Lake	895	1,483	360	40.22%	24.28%	535	59.78%	75.72%
Pelham	524	921	134	25.57%	14.55%	390	74.43%	85.45%
Port Colborne	291	473	115	39.52%	24.31%	176	60.48%	75.69%
St. Catharines	245	402	97	39.59%	24.13%	148	60.41%	75.87%
Thorold	202	306	100	49.50%	32.68%	102	50.50%	67.32%
Wainfleet	706	1,083	342	48.44%	31.58%	364	51.56%	68.42%
Welland	101	168	35	34.65%	20.83%	66	65.35%	79.17%
West Lincoln	1,336	2,300	422	31.59%	18.35%	914	68.41%	81.65%
Niagara Region	6,081	10,208	2,188	35.98%	21.43%	3,893	64.02%	78.57%

Typical Farm Property Changes

In light of the fact that the Region's Farms are not fully, or well represented by changes to farm class assessment and tax change alone, MTE has expanded on the typical farm property analysis.

- Table 29-A includes farm class property portions only, regardless of whether they represent the entire farm or only a component of the property;
- Table 29-B is based on single portion farms classified solely in the farm property class;
- Table 29-C looks at only those farm properties with additional non-farm portions; and
- Table 29-D includes all portions of all properties including both single and multi-portion farms.

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Table 29-A
Typical Farm Class (FT) Property Portions Only: Single and Multi-Portion Farms
(2018 actual to 2019 Notional General Municipal Levy Amounts – Farm Class Tax Only)

Municipality	Average CVA			2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined	Tax Shift	Tax Shift
Fort Erie	180,070	189,079	5.00%	\$255	\$308	\$563	\$258	\$316	\$574	\$11	1.95%
Grimsby	344,093	377,873	9.82%	\$488	\$214	\$702	\$516	\$222	\$738	\$36	5.13%
Lincoln	445,875	492,092	10.37%	\$632	\$475	\$1,107	\$671	\$501	\$1,172	\$65	5.87%
Niagara Falls	236,918	264,488	11.64%	\$336	\$269	\$605	\$361	\$288	\$649	\$44	7.27%
Niagara-on-the-Lake	496,492	552,532	11.29%	\$704	\$258	\$962	\$754	\$274	\$1,028	\$66	6.86%
Pelham	273,263	299,637	9.65%	\$387	\$337	\$724	\$409	\$358	\$767	\$43	5.94%
Port Colborne	174,557	184,769	5.85%	\$247	\$368	\$615	\$252	\$379	\$631	\$16	2.60%
St. Catharines	470,259	521,208	10.83%	\$667	\$634	\$1,301	\$711	\$677	\$1,388	\$87	6.69%
Thorold	232,298	245,058	5.49%	\$329	\$340	\$669	\$334	\$348	\$682	\$13	1.94%
Wainfleet	225,642	257,103	13.94%	\$320	\$328	\$648	\$351	\$357	\$708	\$60	9.26%
Welland	177,207	197,696	11.56%	\$251	\$343	\$594	\$270	\$372	\$642	\$48	8.08%
West Lincoln	273,501	313,331	14.56%	\$388	\$236	\$624	\$427	\$257	\$684	\$60	9.62%
Region Average	324,970	361,619	11.28%	\$461	\$419	\$880	\$493	\$450	\$943	\$63	7.16%
Region Median	229,450	259,000	12.88%	\$325	\$296	\$621	\$353	\$322	\$675	\$54	8.70%

Interpretation Note:

Based on all property in the farm property class but does not consider any portions of those properties that may be classified in other classes.



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Table 29-B
Typical Single Portion / Stand-Alone Farm Class (FT) Properties
(2018 actual to 2019 Notional General Municipal Levy Amounts – Farm Class Tax Only)

Municipality	Average CVA			2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined	Tax Shift	
Fort Erie	168,265	176,167	4.70%	\$239	\$288	\$527	\$240	\$295	\$535	\$8	1.52%
Grimsby	361,181	399,388	10.58%	\$512	\$225	\$737	\$545	\$234	\$779	\$42	5.70%
Lincoln	436,891	483,580	10.69%	\$619	\$466	\$1,085	\$660	\$492	\$1,152	\$67	6.18%
Niagara Falls	243,201	271,929	11.81%	\$345	\$276	\$621	\$371	\$297	\$668	\$47	7.57%
Niagara-on-the-Lake	512,624	576,892	12.54%	\$727	\$267	\$994	\$787	\$286	\$1,073	\$79	7.95%
Pelham	299,414	330,051	10.23%	\$424	\$369	\$793	\$450	\$394	\$844	\$51	6.43%
Port Colborne	177,977	190,367	6.96%	\$252	\$375	\$627	\$260	\$390	\$650	\$23	3.67%
St. Catharines	574,638	634,721	10.46%	\$815	\$774	\$1,589	\$866	\$825	\$1,691	\$102	6.42%
Thorold	206,898	218,302	5.51%	\$293	\$303	\$596	\$298	\$310	\$608	\$12	2.01%
Wainfleet	206,996	237,785	14.87%	\$293	\$301	\$594	\$324	\$331	\$655	\$61	10.27%
Welland	186,597	209,257	12.14%	\$265	\$361	\$626	\$285	\$394	\$679	\$53	8.47%
West Lincoln	253,710	293,242	15.58%	\$360	\$219	\$579	\$400	\$241	\$641	\$62	10.71%
Niagara Region	321,388	359,757	11.94%	\$456	\$328	\$784	\$491	\$351	\$842	\$58	7.40%

Interpretation Note:

This table only includes properties that are solely assessed in the farm property class. Farm properties attached to non-farm portions have been excluded.



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Table 29-C
Multi-Portion Farm Properties: Farm (FT) + Mixed Portion(s)
(2018 actual to 2019 Notional General Municipal Levy Amounts for all Applicable Classes)

Municipality	Average CVA		2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined	Tax Shift
Fort Erie	361,410	380,319	5.23%	\$1,299	\$1,569	\$2,868	\$1,315	\$1,613	\$2,928	\$60 2.09%
Grimsby	558,910	602,836	7.86%	\$1,751	\$769	\$2,520	\$1,794	\$772	\$2,566	\$46 1.83%
Lincoln	704,146	765,723	8.74%	\$2,340	\$1,759	\$4,099	\$2,413	\$1,802	\$4,215	\$116 2.83%
Niagara Falls	488,772	533,536	9.16%	\$2,113	\$1,693	\$3,806	\$2,202	\$1,760	\$3,962	\$156 4.10%
Niagara-on-the-Lake	764,561	833,522	9.02%	\$2,626	\$963	\$3,589	\$2,716	\$989	\$3,705	\$116 3.23%
Pelham	490,752	525,931	7.17%	\$1,692	\$1,471	\$3,163	\$1,720	\$1,506	\$3,226	\$63 1.99%
Port Colborne	356,793	374,711	5.02%	\$1,427	\$2,122	\$3,549	\$1,443	\$2,167	\$3,610	\$61 1.72%
St. Catharines	662,391	723,685	9.25%	\$2,270	\$2,157	\$4,427	\$2,348	\$2,237	\$4,585	\$158 3.57%
Thorold	465,959	490,963	5.37%	\$1,565	\$1,617	\$3,182	\$1,586	\$1,653	\$3,239	\$57 1.79%
Wainfleet	407,394	449,662	10.38%	\$1,325	\$1,357	\$2,682	\$1,377	\$1,402	\$2,779	\$97 3.62%
Welland	378,214	406,210	7.40%	\$1,442	\$1,969	\$3,411	\$1,461	\$2,015	\$3,476	\$65 1.91%
West Lincoln	477,428	527,852	10.56%	\$1,628	\$991	\$2,619	\$1,680	\$1,011	\$2,691	\$72 2.75%
Niagara Region	549,600	598,167	8.84%	\$1,891	\$1,381	\$3,272	\$1,947	\$1,416	\$3,363	\$91 2.78%

Interpretation Note:

These results consider all multi-portion farms, which are those rolls with a farm classification and at least one other portion (residential, commercial, etc...). Properties solely assessed in the farm property class have been excluded.



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Table 29-D
All Farm Rolls: Single and Multi-Portion Farms
(2018 actual to 2019 Notional General Municipal Levy Amounts for all Applicable Classes)

Municipality	Average CVA		2018 Municipal General Levy			2019 Municipal General Levy			Phase-In Related	
	2018	2019	Change	Region	Local	Combined	Region	Local	Combined	Tax Shift
Fort Erie	288,218	302,956	5.11%	\$897	\$1,083	\$1,980	\$907	\$1,113	\$2,020	\$40 2.02%
Grimsby	508,579	551,049	8.35%	\$1,435	\$630	\$2,065	\$1,476	\$635	\$2,111	\$46 2.23%
Lincoln	623,558	680,646	9.16%	\$1,821	\$1,369	\$3,190	\$1,885	\$1,407	\$3,292	\$102 3.20%
Niagara Falls	386,790	424,895	9.85%	\$1,379	\$1,105	\$2,484	\$1,441	\$1,152	\$2,593	\$109 4.39%
Niagara-on-the-Lake	663,223	730,296	10.11%	\$1,862	\$683	\$2,545	\$1,940	\$706	\$2,646	\$101 3.97%
Pelham	441,822	475,840	7.70%	\$1,368	\$1,189	\$2,557	\$1,395	\$1,222	\$2,617	\$60 2.35%
Port Colborne	286,127	301,860	5.50%	\$963	\$1,432	\$2,395	\$975	\$1,464	\$2,439	\$44 1.84%
St. Catharines	627,648	688,462	9.69%	\$1,694	\$1,609	\$3,303	\$1,762	\$1,678	\$3,440	\$137 4.15%
Thorold	337,711	355,982	5.41%	\$936	\$967	\$1,903	\$948	\$989	\$1,937	\$34 1.79%
Wainfleet	310,317	347,025	11.83%	\$825	\$845	\$1,670	\$867	\$883	\$1,750	\$80 4.79%
Welland	311,812	337,959	8.39%	\$1,034	\$1,412	\$2,446	\$1,054	\$1,453	\$2,507	\$61 2.49%
West Lincoln	406,763	453,746	11.55%	\$1,228	\$747	\$1,975	\$1,276	\$768	\$2,044	\$69 3.49%
Niagara Region	467,487	512,385	9.60%	\$1,374	\$1,002	\$2,376	\$1,423	\$1,033	\$2,456	\$80 3.37%

Interpretation Note:

This table shows the average assessment and corresponding taxes for all properties with a farm classification. It considers single portion farms and all elements of multi-portion farm properties.



New Agri-Food Business Subclasses for Farm Properties

As part of the previous Government's *2017 Ontario Economic Outlook and Fiscal Review (Fall Budget)*, The Minister of Finance announced that new property sub-classes would be introduced to facilitate special treatment of commercial and industrial improvements on farm properties. These new sub-classes are optional for municipal purposes and are intended to give municipalities a means of incenting / supporting small scale Agri-Food enterprises.

It was announced that these sub-classes would apply for education purposes, regardless of whether a municipality chooses to participate. This means that local municipalities will be required to administer these new sub-classes even if they do not use them for municipal tax purposes.

The following has been prepared to provide staff and decision makers with a measure of general insight regarding the purpose, nature and potential financial implications of these new sub-classes.

As MPAC did not include these property portions on the roll as returned for 2019 it is not possible to incorporate these new sub-classes into a fully realized tax policy model. Instead, we have prepared a general qualitative overview to consider the purpose, structure and function of the new sub-classes.

Farm Class and New Sub-Class Overview

Currently Ontario's property assessment and taxation system includes two mandated sub-classes within each of the commercial and industrial property classes: vacant land and excess land. In simple terms, the vacant land sub-classes include complete parcels (rolls) that are classified as commercial or industrial due to zoning or historic use but which are completely absent of assessable improvements. The excess land sub-class is assigned to unused portions of improved property that exceed local zoning requirements¹.

The new farm sub-classes will also be constituent of the commercial and industrial classes but distinct from those described above in three critical ways:

- 1) They will be optional and will not apply for municipal purposes unless adopted ²;
- 2) They will only apply to commercial or industrial portions of rolls that also include a portion included in the farm property class; and
- 3) Rather than applying to a physically delineated or identifiable property or portion of property, they apply to a portion of the property's value and as such will really only exist for taxation purposes alone.

Also, with uniform class specific reductions of 75% these sub-classes will attract much larger discounts than the current sub-classes, which default at 30% and 35% for commercial and industrial respectively.

¹ For example: If zoning required two acres for a gas station and the property was 10 acres, the buildings and two acres may be assessed as full commercial and the remaining eight acres assessed as commercial excess.

² The existing sub-classes apply by default and municipalities must seek special regulatory authority to opt out.

Eligible Properties

A large proportion of *farms* as understood outside the realm of property tax are made up of a farm class portion and portions that fall into other classes. The most common combination is a farm (FT) portion mixed with a residential (RT) portion associated with a farm house or other non-farm related improvements.

Some farms do have elements classified as commercial or industrial based on use. For example, if a farmer were to operate a produce market or butcher shop as part of their overall business model, the property could be made up of three separate portions: farmland, residential and commercial.

In this example the property is captured by a single roll number but made up of three separately classified and valued portions, each of which attracts distinct tax rates for both municipal and education purposes.

Element	Classification	CVA	Ratio	Rate	Tax
Farm Land & Buildings	Farm (FT)	300,000	0.25	0.25%	\$750
Home	Residential (RT)	100,000	1.00	1.00%	\$1,000
Retail Store	Commercial (CT)	125,000	1.50	1.50%	\$1,875
Property Total		525,000			\$3,625



It is understood that these new sub-classes will be exclusive to properties such as this that have a commercial or industrial portion, but which are mainly, or at least partially, assessed in the farm property class.

If adopted, the subclass would apply to the first 50,000 of the commercial CVA, thereby splitting the property into four portions rather than three. The following table illustrates the impact on our hypothetical example.

Element	Classification	CVA	Ratio	Discount	Rate	Tax
Farm Land & Buildings	Farm (FT)	300,000	0.25	1.00	0.25%	\$750
Home	Residential (RT)	100,000	1.00	1.00	1.00%	\$1,000
Retail Store	<i>Commercial</i>					
	Agri-Food Sub-Class	50,000	1.50	0.25	0.38%	\$188
	Fully Occupied	75,000	1.50	1.00	1.50%	\$1,125
Property Total		525,000				\$3,063
Without Sub-Class		525,000				\$3,625
Tax Savings		0				-\$563

As noted above, the application of this new treatment should not impact the overall assessment of the commercial (industrial) element or any other portion of the property. Also, unlike portions classified into one of the vacant or excess land sub-classes, the eligible element cannot be physically delineated or identified separately from the greater commercial (industrial portion).

What will really happen is that the value of the commercial portion will be split and a lower rate of taxation will be applied to the first 50,000. If the business class portion as a whole was assessed at less than 50,000 it would be captured solely by the sub-class.

As the program was conceived to be an incentive/benefit for small-scale commercial and industrial operations that are ostensibly ancillary to farming operations, they will place a ceiling of 1,000,000 of CVA on the overall value of eligible portions. As such, if our example property included a large scale industrial processing operation with over 1,000,000 in CVA, the sub-class would not apply.

This limitation is intended to ensure a level playing field among larger on-farm and off-farm commercial and industrial enterprises.

Nature of Enterprise

These sub-classes will not capture all on-farm business activities. The Regulation restricts the application to commercial and industrial activities that are derivative of the broader farm operation. Specifically, commercial and industrial activities must meet the following eligibility criteria.

Commercial: Land used primarily to sell farm products, or a product derived from a farm product or products, that are produced on the land or on land used to carry on the same farming business.

Industrial: Land used primarily to process, or manufacture something from, a farm product or products that are produced on the land or on land used to carry on the same farming business.

Although this seems to be consistent with the spirit and intent of introducing these new sub-classes we suspect that these criteria will prove exceptionally problematic. Of primary concern is the time and resources that it will take to identify and confirm the nature of each enterprise. If the Province had simply left it at on-farm commercial and industrial improvements, the new sub-classes could have been implemented easily without the need to identify what was actually going on at each site.

We anticipate this will result in implementation problems and delays and is also ripe for endless disputes and appeals over what is, and what is not, a derivative activity. Unfortunately such disputes will consume already scarce assessment resources and create additional and unnecessary points of potential frustration and conflict. Further, when we consider the quantum of tax involved here (+/- less than \$700 per property), the effort and complications involved may far outweigh any benefit for taxpayers or to the overall taxation system.

PART FIVE: TAX POLICY SENSITIVITY ANALYSIS

For 2019, the *Municipal Act* continues to provide upper and single-tier municipalities with a range of tax policy tools that may be used to alter the distribution of the tax burden both within and between tax classes. The following tools may be used to change or achieve local tax policy objectives, target the benefits of growth, or redistribute the impacts of assessment change.³

1. Tax ratios may be adjusted to affect the level of taxation on different tax classes;
2. Optional business property classes may be employed or collapsed to alter taxation within broad commercial or industrial tax classes;
3. Sub-class discounts for vacant and excess land may be adjusted;
4. Graduated taxation schemes for the business classes can be used to impose higher rates of taxation on properties with higher current value assessment in order to provide tax relief on properties with lower assessed values.

A comprehensive examination of tax ratios and a relevant sensitivity analysis should be undertaken each year. Specific examination of the use of optional tax classes and graduated taxation are generally only required if these options are being actively considered. After considering the contents of this report Council may wish to further explore the utility and application of these alternate apportionment and mitigation strategies.

Moving Tax Ratios

Single-tier municipalities are required to establish tax ratios for the multi-residential, commercial, industrial, landfill and pipeline classes prior to finalizing tax rates for the current year's tax cycle. Established ratios will ultimately govern the relationship between the rate of taxation for each affected class and the tax rate for the residential property class.

The tax ratio for the residential class is legislated at 1.0, while the farm and managed forest classes have a prescribed tax ratio of 0.25. Municipalities do have the flexibility to set a tax ratio for the farm class that is below 0.25, however, this reduction would only apply to the municipal portion of the property tax bill.

In setting tax ratios for all other property classes, municipalities must do so within the guidelines prescribed by the Province. Council may choose to adopt: (1) either the current tax ratio for any class (2018 adopted or 2019 starting ratio where levy restriction and/or optional classes applied in 2018), (2) establish a new tax ratio for the year that is closer to or within the Range of Fairness, as shown in Table 30; or (3) utilize restated revenue neutral transition ratios to mitigate reassessment related tax shifts between classes in accordance with the regulated calculations.

³ The by-law deadlines for many tax policy decisions is December 31st of the subject taxation year.

Table 30
Tax Ratio Summary

Realty Tax Class	2018 Ratios	2019 Start Ratios	Ranges of Fairness		Threshold Ratios	
			Lower Limit	Upper Limit	Threshold	Subject to Levy Restriction
Residential	1.000000	1.000000	1.00	1.00	-	N/A
Farm	0.250000	0.250000	0.00	0.25	-	N/A
Managed Forest	0.250000	0.250000	0.25	0.25	-	N/A
New Multi-Residential	1.000000	1.000000	1.00	1.10	-	N/A
Multi-Residential	1.970000	1.970000	1.00	1.10	2.00	No
Commercial	1.734900	1.734900	0.60	1.10	1.98	No
Industrial	2.630000	2.630000	0.60	1.10	2.63	No
Landfill	2.940261	2.940261	0.60	1.10	25.00	No
Pipeline	1.702100	1.702100	0.60	0.70	-	N/A

Where Optional Classes Apply

Where a municipality has elected to use optional tax classes, changes to tax ratios are regulated based on the relationship of the municipality's broad class ratios (the weighted average of commercial, shopping centre, office, and parking lot is equivalent to the broad commercial class, and industrial and large industrial are deemed to be the broad industrial class).

Council must ensure that the weighted average broad class ratio for the current year does not exceed the broad class ratio for the prior year. To strictly comply with the provisions of Section 308 of the *Municipal Act*, adjustments to tax ratios may be required for the commercial and industrial tax classes.

The legislated deadline that previously applied to the creation of new, or the collapsing of existing optional classes, has now been eliminated, however, municipalities that intend to make a change to the class structure need to make this decision before any tax rate or ratio by-laws can be passed. It is also critical to provide the Province with as much advanced notice of any such change, as it could impact the manner in which education tax rates are calculated and/or regulated for the taxation year.

Tax Ratios and Balance of Taxation

Tax ratios govern the tax rate of each property class in relation to the tax rate for the residential property class. Ontario's tax ratio system is not simply about expressing the relationship among tax rates, the real function of tax ratios is to manipulate the balance of taxation among property classes.

Tax ratios effectively alter the weighting, or distribution of the tax burden compared to how the total levy would be shared if each dollar of CVA was treated equally. Table 31 shows how the share of tax differs from the share of assessment for each class in accordance with the municipality's starting ratios for the year. The more dramatic the ratio, the larger the difference between the share of assessment and share of tax each class carries. By changing tax ratios, the municipality can influence and alter this balance.

Table 31
Balance of Taxation

Realty Tax Class	Assessment		General Levy	
	2019 CVA	%	2019 Tax	%
<i>Taxable</i>				
Residential	46,877,880,220	79.06%	\$255,643,196	71.27%
Farm	2,199,003,701	3.71%	\$3,000,078	0.84%
Managed Forest	13,907,719	0.02%	\$18,975	0.01%
New Multi-Residential	144,085,061	0.24%	\$786,297	0.22%
Multi-Residential	1,346,916,747	2.27%	\$14,480,189	4.04%
Commercial	6,954,686,379	11.73%	\$64,796,932	18.06%
Industrial	839,898,339	1.42%	\$11,434,577	3.19%
Landfill	3,536,625	0.01%	\$56,746	0.02%
Pipeline	240,756,173	0.41%	\$2,236,301	0.62%
Sub-Total Taxable	58,620,670,964	98.87%	\$352,453,291	98.26%
<i>Payment in Lieu</i>				
Residential	32,039,644	0.05%	\$174,847	0.05%
Farm	461,250	0.00%	\$629	0.00%
Commercial	624,897,194	1.05%	\$5,873,532	1.64%
Industrial	12,594,937	0.02%	\$167,080	0.05%
Landfill	1,481,925	0.00%	\$23,778	0.01%
Sub-Total PIL	671,474,950	1.13%	\$6,239,866	1.74%
Total (Taxable + PIL)	59,292,145,914	100.00%	\$358,693,157	100.00%

Discussion and Explanation

The assistance of Municipal Tax Equity (MTE) Consultants Inc. has been sought by the Region of Niagara to generate tax rates and corresponding levy amounts which may be under consideration for 2019.

In preparing these results, MTE has relied on the following general parameters:

1. The 2019 start ratios as documented in Table 16 of the municipality's 2019 Tax Policy Study dated January 16, 2019;
2. A 2019 revenue neutral general levy of \$352,453,424;
3. A 2019 target levy of \$365,725,637;
4. Tax amounts represent CVA taxes, no capping adjustments have been applied; and
5. Tax rate calculations performed are based on taxable only and exclude grantable (payment in lieu) assessment, as requested by the municipality.

Scenario 1 has been prepared to set out the impact of the levy increase using status quo ratios. The results of this model have been documented in the following tables.

Table 1-A summarizes the full class municipal purpose tax rates and the 2019 tax rate increase required to raise the levy requirement using status quo tax ratios.

Table 1-A
2019 Tax Ratios and General Tax Rates
(Start Ratios)

Realty Tax Class	Start Ratios	General Levy Tax Rates		
		Status Quo	Model	Change
Residential	1.000000	0.00545717	0.00566267	3.77%
Farm	0.250000	0.00136429	0.00141567	3.77%
Managed Forest	0.250000	0.00136429	0.00141567	3.77%
New Multi-Residential	1.000000	0.00545717	0.00566267	3.77%
Multi-Residential	1.970000	0.01075062	0.01115546	3.77%
Commercial	1.734900	0.00946764	0.00982417	3.77%
Industrial	2.630000	0.01435236	0.01489282	3.77%
Landfill	2.940261	0.01604550	0.01664973	3.77%
Pipeline	1.702100	0.00928865	0.00963843	3.77%

Table 1-B has been prepared to summarize the Region's revenue neutral (base) levy and full levy using status quo tax ratios and the tax rates set out in Table 1-A.

Table 1-B
2019 Regional General Levy Increase
(Start Ratios)

Realty Tax Class	2019 General Levy		Levy Increase	
	Revenue Neutral	Target Levy	\$	%
<i>Taxable</i>				
Residential	\$255,643,196	\$265,269,922	\$9,626,726	3.77%
Farm	\$3,000,078	\$3,113,064	\$112,986	3.77%
Managed Forest	\$18,975	\$19,689	\$714	3.76%
New Multi-Residential	\$786,297	\$815,906	\$29,609	3.77%
Multi-Residential	\$14,480,189	\$15,025,476	\$545,287	3.77%
Commercial	\$64,796,932	\$67,237,038	\$2,440,106	3.77%
Industrial	\$11,434,577	\$11,865,165	\$430,588	3.77%
Landfill	\$56,746	\$58,884	\$2,138	3.77%
Pipeline	\$2,236,301	\$2,320,512	\$84,211	3.77%
Sub-Total Taxable	\$352,453,291	\$365,725,656	\$13,272,365	3.77%
<i>Payment in Lieu</i>				
Residential	\$174,847	\$181,430	\$6,583	3.77%
Farm	\$629	\$653	\$24	3.82%
Commercial	\$5,873,532	\$6,094,719	\$221,187	3.77%
Industrial	\$167,080	\$173,372	\$6,292	3.77%
Landfill	\$23,778	\$24,674	\$896	3.77%
Sub-Total PIL	\$6,239,866	\$6,474,848	\$234,982	3.77%
Total (Taxable + PIL)	\$358,693,157	\$372,200,504	\$13,507,347	3.77%

Table 1-C documents the net year-over-year tax change by class before and after the levy increase is applied. Status quo starting ratios are applied in both instances.

Table 1-C
2019 Regional General Levy and Year-Over-Year Tax Change

Realty Tax Class	2018 As Revised	Revenue Neutral		Target Levy	
		\$	%	\$	%
<i>Taxable</i>					
Residential	\$256,369,618	-\$726,422	-0.28%	\$8,900,304	3.47%
Farm	\$2,801,577	\$198,501	7.09%	\$311,487	11.12%
Managed Forest	\$18,205	\$770	4.23%	\$1,484	8.15%
New Multi-Residential	\$780,797	\$5,500	0.70%	\$35,109	4.50%
Multi-Residential	\$14,547,107	-\$66,918	-0.46%	\$478,369	3.29%
Commercial	\$64,130,454	\$666,478	1.04%	\$3,106,584	4.84%
Industrial	\$11,482,587	-\$48,010	-0.42%	\$382,578	3.33%
Landfill	\$57,780	-\$1,034	-1.79%	\$1,104	1.91%
Pipeline	\$2,265,299	-\$28,998	-1.28%	\$55,213	2.44%
Sub-Total Taxable	\$352,453,424	-\$133	0.00%	\$13,272,232	3.77%
<i>Payment in Lieu</i>					
Residential	\$167,300	\$7,547	4.51%	\$14,130	8.45%
Farm	\$612	\$17	2.78%	\$41	6.70%
Commercial	\$5,947,061	-\$73,529	-1.24%	\$147,658	2.48%
Industrial	\$156,900	\$10,180	6.49%	\$16,472	10.50%
Landfill	\$20,973	\$2,805	13.37%	\$3,701	17.65%
Sub-Total PIL	\$6,292,846	-\$52,980	-0.84%	\$182,002	2.89%
Total (Taxable + PIL)	\$358,746,270	-\$53,113	-0.01%	\$13,454,234	3.75%

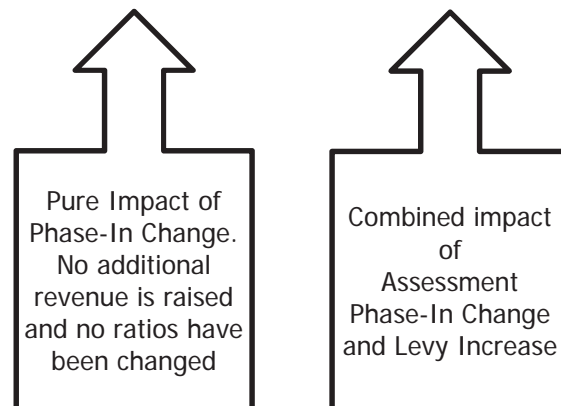


Table 1-D has been prepared to summarize the Region's revenue neutral (base) levy and full levy using status quo tax ratios by local municipality. Table 1-E documents the net year-over-year tax change by municipality before and after the levy increase is applied. Status quo starting ratios are applied in both instances.

Table 1-D
Regional General Levy Sensitivity
(In comparison to 2019 Base-Line Levy)

Local Municipality	Regional Levy		Difference	
	Revenue Neutral	Target Levy	\$	%
Fort Erie	\$22,072,979	\$22,904,183	\$831,204	3.77%
Grimsby	\$26,414,076	\$27,408,753	\$994,677	3.77%
Lincoln	\$20,591,427	\$21,366,842	\$775,415	3.77%
Niagara Falls	\$74,370,381	\$77,170,956	\$2,800,575	3.77%
Niagara-on-the-Lake	\$30,313,217	\$31,454,724	\$1,141,507	3.77%
Pelham	\$14,611,236	\$15,161,450	\$550,214	3.77%
Port Colborne	\$11,484,857	\$11,917,344	\$432,487	3.77%
St. Catharines	\$93,556,655	\$97,079,729	\$3,523,074	3.77%
Thorold	\$14,018,740	\$14,546,646	\$527,906	3.77%
Wainfleet	\$5,309,361	\$5,509,296	\$199,935	3.77%
Welland	\$28,758,816	\$29,841,789	\$1,082,973	3.77%
West Lincoln	\$10,951,546	\$11,363,949	\$412,403	3.77%
Niagara Region	\$352,453,291	\$365,725,661	\$13,272,370	3.77%

Table 1-E
Regional General Levy Sensitivity / Year-Over-Year Tax Change
(In comparison to 2018 Year-End Levy)

Local Municipality	2018 As Revised	Revenue Neutral		Target Levy	
		\$	%	\$	%
Fort Erie	\$22,428,328	-\$355,349	-1.58%	\$475,855	2.12%
Grimsby	\$25,883,857	\$530,219	2.05%	\$1,524,896	5.89%
Lincoln	\$20,443,857	\$147,570	0.72%	\$922,985	4.51%
Niagara Falls	\$74,209,801	\$160,580	0.22%	\$2,961,155	3.99%
Niagara-on-the-Lake	\$30,082,399	\$230,818	0.77%	\$1,372,325	4.56%
Pelham	\$14,718,064	-\$106,828	-0.73%	\$443,386	3.01%
Port Colborne	\$11,599,092	-\$114,235	-0.98%	\$318,252	2.74%
St. Catharines	\$93,802,595	-\$245,940	-0.26%	\$3,277,134	3.49%
Thorold	\$14,142,691	-\$123,951	-0.88%	\$403,955	2.86%
Wainfleet	\$5,281,328	\$28,033	0.53%	\$227,968	4.32%
Welland	\$29,032,299	-\$273,483	-0.94%	\$809,490	2.79%
West Lincoln	\$10,829,113	\$122,433	1.13%	\$534,836	4.94%
Niagara Region	\$352,453,424	-\$133	0.00%	\$13,272,237	3.77%

Scenario 3 has been prepared to document the impact of utilizing 50% of the negative residential shift at revenue neutral to reduce the multi-residential ratio. All classes share equally in the levy increase.

Table 3-A summarizes both the status quo starting ratios and the alternate ratios applied in this model; only the multi-residential ratio has been adjusted. This table also contains the full class municipal purpose tax rates required to raise the levy target using both the start and modified ratios.

Table 3-A
2019 Tax Ratios and Municipal Purpose Tax Rates
(To Raise Target Levy)

Realty Tax Class	Tax Ratios			General Levy Tax Rates		
	Start	Model	Change	Start	Model	Change
Residential	1.000000	1.000000	0.00%	0.00566267	0.00567071	0.14%
Farm	0.250000	0.250000	0.00%	0.00141567	0.00141768	0.14%
Managed Forest	0.250000	0.250000	0.00%	0.00141567	0.00141768	0.14%
New Multi-Residential	1.000000	1.000000	0.00%	0.00566267	0.00567071	0.14%
Multi-Residential	1.970000	1.902000	-3.45%	0.01115546	0.01078569	-3.31%
Commercial	1.734900	1.734900	0.00%	0.00982417	0.00983811	0.14%
Industrial	2.630000	2.630000	0.00%	0.01489282	0.01491397	0.14%
Landfill	2.940261	2.940261	0.00%	0.01664973	0.01667337	0.14%
Pipeline	1.702100	1.702100	0.00%	0.00963843	0.00965212	0.14%



 Both sets of tax rates have been calculated using a revenue target of \$365,725,637

Table 3-B summarizes the 2019 municipal levy model prepared using the reduced multi-residential ratio.

Table 3-C compares that base-line, status-quo levy model with this revised model.

Table 3-B
2019 Regional General Levy Increase
(Reduced Multi-Residential Ratio)

Realty Tax Class	2019 General Levy		Levy Increase	
	Revenue Neutral	Levy Target	\$	%
<i>Taxable</i>				
Residential	\$256,006,250	\$265,646,559	\$9,640,311	3.77%
Farm	\$3,004,345	\$3,117,484	\$113,139	3.77%
Managed Forest	\$19,001	\$19,717	\$716	3.77%
New Multi-Residential	\$787,414	\$817,065	\$29,651	3.77%
Multi-Residential	\$14,000,230	\$14,527,426	\$527,197	3.77%
Commercial	\$64,888,976	\$67,332,445	\$2,443,462	3.77%
Industrial	\$11,450,813	\$11,882,014	\$431,200	3.77%
Landfill	\$56,827	\$58,967	\$2,140	3.77%
Pipeline	\$2,239,477	\$2,323,807	\$84,332	3.77%
Sub-Total Taxable	\$352,453,333	\$365,725,484	\$13,272,148	3.77%
<i>Payment in Lieu</i>				
Residential	\$175,091	\$181,687	\$6,593	3.77%
Farm	\$630	\$654	\$24	3.81%
Commercial	\$5,881,881	\$6,103,367	\$221,488	3.77%
Industrial	\$167,317	\$173,618	\$6,301	3.77%
Landfill	\$23,812	\$24,709	\$897	3.77%
Sub-Total PIL	\$6,248,731	\$6,484,035	\$235,303	3.77%
Total (Taxable + PIL)	\$358,702,064	\$372,209,519	\$13,507,451	3.77%

Both the revenue neutral
and target levy have been
calculated using the
adjusted multi-residential
ratio

Table 3-C
2019 Regional General Levy Interclass Shifts

Realty Tax Class	2019 General Levy		Interclass Shifts	
	Start Ratio	Alternate Model	\$	%
<i>Taxable</i>				
Residential	\$265,269,922	\$265,646,559	\$376,637	0.14%
Farm	\$3,113,064	\$3,117,484	\$4,420	0.14%
Managed Forest	\$19,689	\$19,717	\$28	0.14%
New Multi-Residential	\$815,906	\$817,065	\$1,159	0.14%
Multi-Residential	\$15,025,476	\$14,527,426	-\$498,050	-3.31%
Commercial	\$67,237,038	\$67,332,445	\$95,407	0.14%
Industrial	\$11,865,165	\$11,882,014	\$16,849	0.14%
Landfill	\$58,884	\$58,967	\$83	0.14%
Pipeline	\$2,320,512	\$2,323,807	\$3,295	0.14%
Sub-Total Taxable	\$365,725,656	\$365,725,484	-\$172	0.00%
<i>Payment in Lieu</i>				
Residential	\$181,430	\$181,687	\$257	0.14%
Farm	\$653	\$654	\$1	0.15%
Commercial	\$6,094,719	\$6,103,367	\$8,648	0.14%
Industrial	\$173,372	\$173,618	\$246	0.14%
Landfill	\$24,674	\$24,709	\$35	0.14%
Sub-Total PIL	\$6,474,848	\$6,484,035	\$9,187	0.14%
Total (Taxable + PIL)	\$372,200,504	\$372,209,519	\$9,015	0.00%

Both models
include levy
increase

Isolated impact
of pipeline tax
ratio change

Table 3-D compares the net year-over-year tax change between the two models set out above. Both document the combined impacts of phase-in related tax change and municipal levy change; the alternate shift summary also reflects the multi-residential ratio change.

Table 3-D
2019 Regional General Levy Year-Over-Year Tax Change

Realty Tax Class	2018 As Revised	Start Ratio		Alternate Model	
		\$	%	\$	%
<i>Taxable</i>					
Residential	\$256,369,618	\$8,900,304	3.47%	\$9,276,941	3.62%
Farm	\$2,801,577	\$311,487	11.12%	\$315,907	11.28%
Managed Forest	\$18,205	\$1,484	8.15%	\$1,512	8.31%
New Multi-Residential	\$780,797	\$35,109	4.50%	\$36,268	4.64%
Multi-Residential	\$14,547,107	\$478,369	3.29%	-\$19,681	-0.14%
Commercial	\$64,130,454	\$3,106,584	4.84%	\$3,201,991	4.99%
Industrial	\$11,482,587	\$382,578	3.33%	\$399,427	3.48%
Landfill	\$57,780	\$1,104	1.91%	\$1,187	2.05%
Pipeline	\$2,265,299	\$55,213	2.44%	\$58,508	2.58%
Sub-Total Taxable	\$352,453,424	\$13,272,232	3.77%	\$13,272,060	3.77%
<i>Payment in Lieu</i>					
Residential	\$167,300	\$14,130	8.45%	\$14,387	8.60%
Farm	\$612	\$41	6.70%	\$42	6.86%
Commercial	\$5,947,061	\$147,658	2.48%	\$156,306	2.63%
Industrial	\$156,900	\$16,472	10.50%	\$16,718	10.66%
Landfill	\$20,973	\$3,701	17.65%	\$3,736	17.81%
Sub-Total PIL	\$6,292,846	\$182,002	2.89%	\$191,189	3.04%
Total (Taxable + PIL)	\$358,746,270	\$13,454,234	3.75%	\$13,463,249	3.75%

Table 3-E compares the base-line, status-quo levy model with the alternate model. Table 3-F compares the net year-over-year tax change between the two models. Both document the combined impacts of phase-in related tax change and regional levy change; the alternate shift summary also reflects the multi-residential ratio change.

Table 3-E
Regional General Levy Sensitivity
(In comparison to 2019 Base-Line Levy)

Local Municipality	Regional Levy		Difference	
	Start Ratio	Model	\$	%
Fort Erie	\$22,904,183	\$22,921,389	\$17,206	0.08%
Grimsby	\$27,408,753	\$27,436,488	\$27,735	0.10%
Lincoln	\$21,366,842	\$21,389,118	\$22,276	0.10%
Niagara Falls	\$77,170,956	\$77,162,857	-\$8,099	-0.01%
Niagara-on-the-Lake	\$31,454,724	\$31,493,800	\$39,076	0.12%
Pelham	\$15,161,450	\$15,176,195	\$14,745	0.10%
Port Colborne	\$11,917,344	\$11,919,324	\$1,980	0.02%
St. Catharines	\$97,079,729	\$96,958,487	-\$121,242	-0.12%
Thorold	\$14,546,646	\$14,551,360	\$4,714	0.03%
Wainfleet	\$5,509,296	\$5,516,941	\$7,645	0.14%
Welland	\$29,841,789	\$29,822,088	-\$19,701	-0.07%
West Lincoln	\$11,363,949	\$11,377,440	\$13,491	0.12%
Niagara Region	\$365,725,661	\$365,725,487	-\$174	0.00%

Table 3-F
Regional General Levy Sensitivity / Year-Over-Year Tax Change
(In comparison to 2018 Year-End Levy)

Local Municipality	2018 As Revised	Status Quo		Alternate Model	
		\$	%	\$	%
Fort Erie	\$22,428,328	\$475,855	2.12%	\$493,061	2.20%
Grimsby	\$25,883,857	\$1,524,896	5.89%	\$1,552,631	6.00%
Lincoln	\$20,443,857	\$922,985	4.51%	\$945,261	4.62%
Niagara Falls	\$74,209,801	\$2,961,155	3.99%	\$2,953,056	3.98%
Niagara-on-the-Lake	\$30,082,399	\$1,372,325	4.56%	\$1,411,401	4.69%
Pelham	\$14,718,064	\$443,386	3.01%	\$458,131	3.11%
Port Colborne	\$11,599,092	\$318,252	2.74%	\$320,232	2.76%
St. Catharines	\$93,802,595	\$3,277,134	3.49%	\$3,155,892	3.36%
Thorold	\$14,142,691	\$403,955	2.86%	\$408,669	2.89%
Wainfleet	\$5,281,328	\$227,968	4.32%	\$235,613	4.46%
Welland	\$29,032,299	\$809,490	2.79%	\$789,789	2.72%
West Lincoln	\$10,829,113	\$534,836	4.94%	\$548,327	5.06%
Niagara Region	\$352,453,424	\$13,272,237	3.77%	\$13,272,063	3.77%

Effects of Levy Restriction

Section 311 of the *Municipal Act* mandates that where a municipality's tax ratio for any of the multi-residential, or broad commercial and industrial classes is above the Provincial "threshold", the class is deemed to be *levy restricted* and is protected from the full effect of any municipal budgetary increase. When this circumstance prevails a larger share of levy change is absorbed by the unrestricted classes.

Table 30 includes a comparison of the municipality's 2018 starting tax ratios at the broad class level to the current Provincial Threshold Ratios. Where a levy restriction applies, the limitations on municipal increases must be considered relative to a specific budgetary decision. The municipality's revenue neutral tax rate, which raises the revenue limit on taxation, can be used as the benchmark.

Under certain budget increase scenarios, Council may wish to consider exercising its option to reduce the tax ratio for any restricted class(es) to or below the Provincial Threshold. By doing so, the class previously receiving the benefit of the restriction would absorb its full share of the municipality's budgetary increase. This should, however, be carefully weighed against the cost of reducing the tax ratio, which will result in tax shifts to all other classes.

The Region of Niagara is not subject to levy restriction in any class.

PART SIX: OTHER REVENUE AND LEVIES***Provincial Education Taxes***

While municipalities levy and collect the education portion of the property tax bill, they have no authority over the tax rates employed for this purpose. Since 1998, education tax rates have been regulated by the Minister of Finance on an annual basis. Uniform education tax rates have been prescribed for properties in residential, multi-residential, farm and managed forest property classes, which apply across the entire province. Traditionally, annual adjustments to the uniform residential education rate have been made to maintain approximate revenue neutrality on a Province-wide basis; it will inevitably impact overall tax levels within each municipal jurisdiction, depending on how values in each area have behaved relative to Province-wide phase-in change averages.

The Province also prescribes business education (BET) rates, however, these are set at a unique level for each upper and single-tier jurisdiction. From 1998 through 2007, the Province attempted to maintain revenue neutrality at the single and upper-tier municipal level when setting education tax rates for the business classes, which meant municipal specific adjustments in reassessment years and rate freezes for non-reassessment years. This changed, however, in 2008 at which time the Minister of Finance began a migration towards uniform commercial and industrial education tax rates. This migration was slowed as of 2011, however, some progress has been made since and the schedule of rates for each year is shown below.

BET Annual Target and Ceiling Rates

Year	Uniform Residential Education Rate	Uniform Farm / Forest Education Rates	Target BET Rates (C&I)	Maximum BET Rates	
				Commercial	Industrial
2008	0.00264000	0.00066000	1.60%	2.50%	3.00%
2009	0.00252000	0.00063000	1.52%	2.30%	2.70%
2010	0.00241000	0.00060250	1.43%	2.15%	2.45%
2011	0.00231000	0.00057750	1.33%	1.73%	1.93%
2012	0.00221000	0.00055250	1.26%	1.49%	1.59%
2013	0.00212000	0.00053000	1.26%	1.49%	1.59%
2014	0.00203000	0.00050750	1.22%	1.46%	1.56%
2015	0.00195000	0.00048750	1.19%	1.43%	1.53%
2016	0.00188000	0.00047000	1.18%	1.40%	1.50%
2017	0.00179000	0.00044750	1.14%	1.39%	1.39%
2018	0.00170000	0.00042500	1.09%	1.34%	1.34%
2019	NOT YET ANNOUNCED OR REGULATED				

Treatment of "New Construction" Properties

Certain business properties may also receive special tax treatment for education purposes if they are eligible for inclusion in one of the "new construction" classes.

- Commercial New Construction: commercial residual, shopping centre or office building.
- Industrial New Construction: industrial residual or large industrial.

The five new construction property classes are based on the same criteria as their traditional counterpart classes, and are subject to differential treatment for education tax purposes only.

2019 Education Tax Rates Not Available as of Publication

As of the date of publication the Province has not announced or published any details regarding 2019 education tax rates. While rates have yet to be spoken about, the Province did publish its education property tax revenue projections as part of its Fall Economic Outlook and Fiscal Review, published on November 15th. The revenue estimates used are consistent with projections from the previous Government's spring budget and suggest a status quo approach to rate setting.

Based on this information, MTE has calculated hypothetical 2019 education tax rates using historic protocols traditionally employed by the Ministry of Finance in setting these rates. The purpose of this exercise is simply to illustrate how the local education levy may change on a year-over-year basis if a status-quo approach is utilized in the setting of these rates for 2019.

Table 37
2018 vs. 2019 Hypothetical Education Levy

Realty Tax Class	Education Levy		Difference	
	2018 as Revised	2019 as Returned	\$	%
<i>Taxable</i>				
Residential	\$76,924,700	\$75,959,200	-\$965,500	-1.26%
Farm	\$840,000	\$890,800	\$50,800	6.05%
Managed Forest	\$5,500	\$5,600	\$100	1.82%
New Multi-Residential	\$234,100	\$233,400	-\$700	-0.30%
Multi-Residential	\$2,213,700	\$2,182,000	-\$31,700	-1.43%
Commercial	\$64,305,400	\$65,013,500	\$708,100	1.10%
Commercial New Construction	\$7,868,700	\$8,009,900	\$141,200	1.79%
Industrial	\$9,008,600	\$9,067,500	\$58,900	0.65%
Industrial New Construction	\$1,175,300	\$1,160,300	-\$15,000	-1.28%
Landfill	\$84,300	\$84,300	\$0	0.00%
Pipeline	\$2,558,100	\$2,527,900	-\$30,200	-1.18%
Total (Taxable + PIL)	\$165,218,400	\$165,134,400	-\$84,000	-0.05%

Results based on Speculative / Estimated Tax Rates and are provided for illustrative purposes only.

The results contained in Table 37 could be impacted by a host of factors once final education tax rates are levied for 2019 including, but not limited to:

- Differences in data/methodology employed by the Ministry in setting tax rates;
- A decision to freeze or even increase education tax rates for 2019;
- A change in the treatment of sub-classes for education purposes; or
- A wholesale change of some description to the manner in which these rates are set or education taxes levied.

One of the reasons we chose to prepare estimated tax rates based on historic protocol was to facilitate the quantification of local impacts should a change in methodology be adopted.

Linear Properties

Unlike the types of properties discussed in preceding elements of this report, railway and power utility lands (commonly known as linear properties) are taxed on the basis of area rather than market value. To facilitate this from an assessment perspective linear properties are returned on the roll with an acreage area rather than a CVA. The tax liability of each property is calculated by applying Provincially regulated rates per acre by the reported area.

The rates per acre prescribed for municipal and education purposes are set out by geographic region in *Ontario Regulations 387/98* and *392/98* respectively. A summary of the current rates for each property type and levy is contained in Table 38. As only a single municipal rate is prescribed, municipalities within two-tier jurisdictions must calculate the upper-tier and local shares of the revenue within the context of their broader “banking” function. In its simplest form, the sharing formula relies on the proportional share each tier collects from the commercial property class.

The treatment of these properties for education purposes, and the manner in which the education portion raised is shared, varies depending on the ownership and tax status of each specific property. The education portion is remitted to the school boards unless local retention is explicitly provided for. Properties coded with an RTQ of “G” do not attract an education rate.

Table 39 provides a summary of the linear properties in each local municipality. Particular attention should be paid to the addition of the new Shortline Railway classification. These applied for 2018, but were not reflected on the original roll as returned. The reader will note that these Shortline Railways are exempt from the municipal rate increases imposed in 2017 and again in 2018 and are therefore subject to a lower rate per acre.

Table 38
Rate per Acre Summary

Linear Property Type	2018 Rates Per Acre	
	Municipal	Education
Utility Corridors	396.09	436.50
Railway Right-of-Way	277.83	291.60
Shortline Railway Right-of-Way	264.83	291.60

Linear Rate Critical Notes

The rates utilized herein are those most recently regulated by the Ministry of Finance. It is unknown if rates will be updated for 2019. Municipalities must confirm final application of rates prior to billing.

Table 40 has been prepared to assist the municipality in quantifying the revenue that may be collected from these properties. These results are summarized by local municipality and RTC-Q. The retention of education levy amounts is discussed further in this report.

Table 39
Linear Property Summary

Local Municipality	RTC/ RTQ	Category	2018 Roll Return		2018 Revised / 2019 Roll Return	
			Count	Acreage	Count	Acreage
Fort Erie	WT	Railway	2	263.67	2	263.67
	UT	Utility	3	74.57	3	76.07
Grimsby	WT	Railway	2	105.24	2	105.24
	UH	Utility	1	91.70	1	91.70
Lincoln	WT	Railway	1	150.69	1	150.69
	UH	Utility	1	246.76	1	246.76
Niagara Falls	WT	Railway	2	339.72	2	339.72
	UT	Utility	1	19.89	1	19.89
	UH	Utility	1	739.63	1	729.21
NOTL	UH	Utility	1	0.44	1	0.44
Pelham	WT	Railway	1	62.01	1	62.01
	UH	Utility	1	398.34	1	398.34
Port Colborne	WT	Railway	2	149.14	2	149.14
	WF	Railway	4	145.83	1	96.13
	BT	Shortline Rail	0	0.00	3	49.70
St. Catharines	WT	Railway	2	176.77	1	107.07
	BT	Shortline Rail	0	0.00	2	69.70
	UH	Utility	1	102.15	1	102.15
Thorold	WT	Railway	2	244.97	1	124.47
	BT	Shortline Rail	0	0.00	2	120.50
	UH	Utility	1	547.76	1	547.76
Wainfleet	WT	Railway	5	221.02	3	160.02
	BT	Shortline Rail	0	0.00	2	61.00
Welland	WT	Railway	5	223.80	2	51.35
	BT	Shortline Rail	0	0.00	3	172.45
	UH	Utility	1	143.66	1	143.66
West Lincoln	WT	Railway	1	146.00	1	146.00
	UH	Utility	1	1,123.09	1	1,123.09
Total			42	5,716.85	44	5,707.93

Municipalities that have had shortline railways added should check to ensure all appropriate adjustments have been made.

Table 40
Linear Property Levy Summary

Local Municipality / Category	2018 Roll Return		2018 Roll Revised		Change	
	Municipal	Education	Municipal	Education	Municipal	Education
Fort Erie						
WT	\$73,255	\$76,886	\$73,255	\$76,886	\$0	\$0
UT	\$29,536	\$32,550	\$30,131	\$33,205	\$595	\$655
Grimsby						
WT	\$29,239	\$30,688	\$29,239	\$30,688	\$0	\$0
UH	\$36,321	\$40,027	\$36,321	\$40,027	\$0	\$0
Lincoln						
WT	\$41,866	\$43,941	\$41,866	\$43,941	\$0	\$0
UH	\$97,739	\$107,711	\$97,739	\$107,711	\$0	\$0
Niagara Falls						
WT	\$94,384	\$99,062	\$94,384	\$99,062	\$0	\$0
UT	\$7,878	\$8,682	\$7,878	\$8,682	\$0	\$0
UH	\$292,960	\$322,848	\$288,833	\$318,300	-\$4,127	-\$4,548
NOTL						
UH	\$174	\$192	\$174	\$192	\$0	\$0
Pelham						
WT	\$17,228	\$18,082	\$17,228	\$18,082	\$0	\$0
UH	\$157,778	\$173,875	\$157,778	\$173,875	\$0	\$0
Port Colborne						
WT	\$41,436	\$43,489	\$41,436	\$43,489	\$0	\$0
WF	\$40,516	\$42,524	\$26,708	\$28,032	-\$13,808	-\$14,492
BT	\$0	\$0	\$13,162	\$14,493	\$13,162	\$14,493
St. Catharines						
WT	\$49,112	\$51,546	\$29,747	\$31,222	-\$19,365	-\$20,324
BT	\$0	\$0	\$18,459	\$20,325	\$18,459	\$20,325
UH	\$40,461	\$44,588	\$40,461	\$44,588	\$0	\$0
Thorold						
WT	\$68,060	\$71,433	\$34,582	\$36,295	-\$33,478	-\$35,138
BT	\$0	\$0	\$31,912	\$35,138	\$31,912	\$35,138
UH	\$216,962	\$239,097	\$216,962	\$239,097	\$0	\$0
Wainfleet						
WT	\$61,406	\$64,449	\$44,458	\$46,662	-\$16,948	-\$17,787
BT	\$0	\$0	\$16,155	\$17,788	\$16,155	\$17,788
Welland						
WT	\$62,178	\$65,260	\$14,267	\$14,974	-\$47,911	-\$50,286
BT	\$0	\$0	\$45,670	\$50,286	\$45,670	\$50,286
UH	\$56,902	\$62,708	\$56,902	\$62,708	\$0	\$0
West Lincoln						
WT	\$40,563	\$42,574	\$40,563	\$42,574	\$0	\$0
UH	\$444,845	\$490,229	\$444,845	\$490,229	\$0	\$0
Total	\$2,000,799	\$2,172,441	\$1,991,115	\$2,168,551	-\$9,684	-\$3,890

It is critical for the reader to note that Table 40 is based on the linear rates regulated for the 2018 taxation year. It is unknown if or how these rates may be adjusted for 2019. If they remain unchanged, the municipality can expect its 2019 linear property levies to match the 2018 levies as revised.

Retained Education Levies for Certain Payment in Lieu Properties

Federal and Provincially owned and occupied properties are exempt from both municipal and Provincial (education) property taxes. Both levels of government do, however, maintain programs whereby payments are made to local governments in lieu of the taxes that would otherwise be applicable to property that they own and occupy.

PIL payments are made and administered under a variety of Federal and Provincial statutes and regulations, including the federal *Payment in Lieu of Taxes Act*, and Ontario's *Municipal Tax Assistance Act*, *Municipal Act, 2001*, *Assessment Act*, and various supporting regulations. This collection of statutes and regulations prescribe not only the circumstances and amounts of PILs that are made, but also the manner in which the payments are shared and distributed.

Of particular interest regarding the sharing of revenues raised against PIL properties is the fact that in certain circumstances the local municipality retains the education portion of the levy as local revenue. This is provided for under sections 2 and 3 of *Ontario Regulation 392/98*, which state that in the case of payments made under a number of specific authorities, the "education" portion is ultimately retained by the local municipality. The eligible payments captured by these rules, are those made in accordance with:

- Subsection 27 (3) of the *Assessment Act*;
- The *Municipal Grants Act* (Canada), which may be referenced as the Payment in Lieu of Taxes Act; and
- Subsections 84(2), (3) or (5) of the *Electricity Act*.

Table 41 provides a speculative summary of the education levy amounts that may be raised under these authorities and which may be retained by the local municipality. As discussed above, all 2019 calculations are based on speculative / estimated tax rates and are provided for general illustrative purposes only.

Table 41
Retained Education Levy Amounts
 (Based on Hypothetical 2019 Rates – For Illustrative Purposes only)

RTC/RTQ	Education Levy		Change	
	2018	2019	\$	%
Fort Erie				
CF	\$107,217	\$104,674	-\$2,543	-2.37%
Total Fort Erie	\$107,217	\$104,674	-\$2,543	-2.37%
Grimsby				
CF	\$184,317	\$194,825	\$10,508	5.70%
CH	\$12,535	\$13,550	\$1,015	8.10%
IH	\$743	\$886	\$143	19.25%
UH	\$40,027	\$40,027	\$0	0.00%
Total Grimsby	\$237,622	\$249,288	\$11,666	4.91%
Lincoln				
CF	\$54,477	\$54,966	\$489	0.90%
CH	\$9,785	\$10,291	\$506	5.17%
IH	\$6,977	\$7,853	\$876	12.56%
IK	\$1,004	\$1,301	\$297	29.58%
UH	\$107,711	\$107,711	\$0	0.00%
Total Lincoln	\$179,954	\$182,122	\$2,168	1.20%
Niagara Falls				
CF	\$237,493	\$242,440	\$4,947	2.08%
CH	\$73,452	\$77,563	\$4,111	5.60%
CJ	\$7,007	\$7,030	\$23	0.33%
CK	\$6,904	\$6,650	-\$254	-3.68%
IH	\$41,817	\$46,117	\$4,300	10.28%
IJ	\$175	\$170	-\$5	-2.86%
IK	\$2,359	\$2,708	\$349	14.79%
UH	\$322,848	\$318,300	-\$4,548	-1.41%
Total Niagara Falls	\$692,055	\$700,978	\$8,923	1.29%
Niagara-on-the-Lake				
CF	\$268,392	\$269,955	\$1,563	0.58%
CH	\$11,044	\$11,411	\$367	3.32%
CJ	\$1,399	\$1,390	-\$9	-0.64%
CK	\$384	\$397	\$13	3.39%
CV	\$16,783	\$17,459	\$676	4.03%
IH	\$1,702	\$1,859	\$157	9.22%
IJ	\$13,864	\$15,151	\$1,287	9.28%
UH	\$192	\$192	\$0	0.00%
Total NOTL	\$313,760	\$317,814	\$4,054	1.29%
Pelham				
CF	\$9,310	\$9,238	-\$72	-0.77%
IH	\$310	\$333	\$23	7.42%
UH	\$173,875	\$173,875	\$0	0.00%
Total Pelham	\$183,495	\$183,446	-\$49	-0.03%

Table 41 Continued
Retained Education Levy Amounts
 (Based on Hypothetical 2019 Rates – For Illustrative Purposes only)

RTC/RTQ	Education Levy		Change	
	2018	2019	\$	%
<i>Port Colborne</i>				
CF	\$117,861	\$116,711	-\$1,150	-0.98%
IH	\$1,014	\$999	-\$15	-1.48%
WF	\$42,524	\$28,032	-\$14,492	-34.08%
Total Port Colborne	\$161,399	\$145,742	-\$15,657	-9.70%
<i>St. Catharines</i>				
CF	\$382,032	\$376,663	-\$5,369	-1.41%
CH	\$59,943	\$59,339	-\$604	-1.01%
CK	\$4,184	\$4,116	-\$68	-1.63%
IH	\$23,421	\$25,155	\$1,734	7.40%
IK	\$5,057	\$5,084	\$27	0.53%
UH	\$44,588	\$44,588	\$0	0.00%
Total St. Catharines	\$519,225	\$514,945	-\$4,280	-0.82%
<i>Thorold</i>				
CF	\$68,330	\$69,422	\$1,092	1.60%
CH	\$6,938	\$7,043	\$105	1.51%
IF	\$1,695	\$1,680	-\$15	-0.88%
IH	\$20,360	\$20,271	-\$89	-0.44%
UH	\$239,097	\$239,097	\$0	0.00%
Total Thorold	\$336,420	\$337,513	\$1,093	0.32%
<i>Wainfleet</i>				
IH	\$137	\$136	-\$1	-0.73%
Total Wainfleet	\$137	\$136	-\$1	-0.73%
<i>Welland</i>				
CF	\$103,764	\$102,189	-\$1,575	-1.52%
CH	\$13,999	\$13,485	-\$514	-3.67%
CK	\$250	\$240	-\$10	-4.00%
IH	\$6,230	\$6,401	\$171	2.74%
IJ	\$15	\$15	\$0	0.00%
HF	\$15,819	\$18,653	\$2,834	17.92%
UH	\$62,708	\$62,708	\$0	0.00%
Total Welland	\$202,785	\$203,691	\$906	0.45%
<i>West Lincoln</i>				
CF	\$21,689	\$21,205	-\$484	-2.23%
IH	\$1,306	\$1,317	\$11	0.84%
HF	\$6,636	\$6,245	-\$391	-5.89%
UH	\$490,229	\$490,229	\$0	0.00%
Total West Lincoln	\$519,860	\$518,996	-\$864	-0.17%
Total Niagara Region	\$3,453,929	\$3,459,345	\$5,416	0.16%

PART SEVEN: BUSINESS TAX CAPPING

Since 1998, property in the multi-residential, commercial and industrial tax classes have been subject to mandatory tax impact mitigation measures that are intended to protect them from year-over-year increases in taxation above maximum thresholds, exclusive of any municipal budgetary change.

Over time, a variety of modified tax capping protection regimes have been implemented, replacing earlier incarnations with more permanent forms of relief. This tradition has created a long legacy of inequity within the multi-residential, commercial and industrial tax classes, which has effectively undermined the original goals of a stable, fair, transparent, and easily administered assessment and property tax system in the Province of Ontario.

The following has been prepared as an overview of the newly expanded slate of capping tools and exit options, and to provide the municipality with an understanding of what its locally specific policy options and program outcomes may be for 2018. The first step is to discuss the options and local eligibility for immediate and/or phased opt-out. The municipality must then consider the newly expanded capping calculation options and the local implications of various strategic combinations.

Expanded Local Capping Options

The Minister of Finance passed legislation that granted municipalities more local autonomy in respect of the business tax capping program as of 2016. The increased options included the ability for municipalities to opt-out of capping altogether if no properties remained eligible for protection. Where properties remained eligible for protection, progress towards full CVA tax (assessment X applicable tax rates) could be further accelerated using the expanded and newly added calculation parameter options. These options were further enhanced and expanded as of the 2017 taxation year.

Similar to the traditional capping calculation/parameter options, the options to opt-out of the business tax capping program have been provided on a class-by-class basis, as are the constraints and limitations being imposed for their use. As such, municipalities must consider both the availability and desirability of these opt-out provisions for each of the multi-residential, commercial and industrial property classes. These options are summarized below.

Immediate Opt-Out: A municipality may exclude a class from the capping program in its entirety if no property within that class was subject to a capping adjustment as of final 2018 tax billing.

Phased Opt-Out: If properties continue to be eligible for capping adjustments, but no property classified as occupied (CT vs. CX, IT vs. IX, etc.) received a capping credit greater than 50% of its total un-capped tax liability for the previous taxation year, the municipality may initiate a staged, four-year exit plan for that class.

In addition to the opt-out and phase-out options, municipalities may also choose to limit protection levels to any outstanding capping protection related to prior reassessment cycles, while flowing through any tax increases resulting from the current reassessment. In effect, this means that taxpayers will not have historic protection removed, but new increases will not be capped.

Capping Decisions

Where a property class is eligible for immediate opt-out, and the municipality chooses this option, the implications are simple; capping will not apply to that class for the tax year in respect of which the policy option is taken, or any subsequent taxation year.

For all other property classes, including those eligible to enter a four-year phase-out, the municipality must establish a complete set of capping parameters for the year, and undertake all of the elements of the capping exercise as in the past. The phase-out will be applied by means of reducing any calculated capping protection by staged percentages. The mechanics of this program are detailed later in this section.

It is important to note that as with any change to a municipality's tax policy, opting out of capping does not apply to prior taxation years, or any adjustment made in respect of a prior taxation year. That is, if a municipality were to exclude the commercial property class for 2018, it would continue to be responsible for considering, and applying any capping protection (or claw-back) that might apply should a recalculation of taxes be required for a prior year.

For any class not eligible for immediate opt-out, or where that option is not exercised, it remains mandatory for the municipality to establish the local capping parameters via by-law before final billing can occur. The range of optional capping tools available fall into three distinct categories and any may be used on their own, or in combination, and be applied differently to each capped class. These categories are:

- 1) Calculation Parameters;
- 2) Property Specific Exclusions; and
- 3) Phase-Out and Flow-Through of Current Cycle Increases.

Calculation Parameters

The first category includes options for adjusting the parameters/thresholds applied in the capping calculation itself. Under these options, municipalities now have the flexibility to:

- Increase the annual cap from 5% of the previous year's final (annualized) capped taxes up to 10%;
- Set a second limit for annual increases of up to 10% of the previous year's annualized CVA (uncapped) taxes;
- Institute a threshold of up to \$500 for increasing properties, decreasing properties, or both. Where a threshold is set, and the difference between a property's capped tax and CVA tax is less than the threshold amount, that property is moved directly to its CVA tax destination; and/or
- For any class with no occupied properties eligible for protection in excess of 50% of CVA tax, initiate the first year of a four-year phase-out.

What is important to take note of in respect of these first two options is the fact that the 10% of Prior Year's CVA Tax limit will always exceed the maximum tax calculated against the Prior Year's Annualized Capped Tax. When the CVA tax limit was restricted to 5%, these two tests were mutually exclusive with one always being greater than the other; this is no longer the case.

Property Specific Exclusions

The second category consists of elements that can be employed to exclude properties from the cap based on the relationship between a property's "Capped tax" and "CVA tax" liability. These options, which may be adopted on their own or in combination with one another, are as follows:

- Exclude properties that reach their CVA tax destination; under this option a property is excluded from the current year's capping program if its final (capped) taxes for the previous year were equal to its CVA taxes for that year;
- Exclude properties that are subject to a cap in one year, and if it were not for the exclusion, would be subject to a claw-back in the next; and/or
- Exclude properties that are subject to claw-back in one year, and if it were not for the exclusion, would be subject to capping in the next.

Although the availability of these various tools has not eliminated all issues related to capping, their use, particularly in light of the enhancements, can be used to effectively move towards a full capping opt-out.

Phase-Out and Current Cycle Flow-Through

For properties in a class that has entered a phase-out plan, a final adjustment will be made to any amount of capping protection calculated for the year, allowing only a portion of the capping credit to flow through. For example, a property that would otherwise be entitled to a \$1,000 capping credit would only receive a \$750 credit in Year 1 of a phase-out plan; the other 25% of this credit would be *phased-out*.

The proportion of the calculated billing adjustment to be added back in, or phased-out, will be based on an annual phase-out factor that will increase from 25% to 100% over four years.

Phase-Out Year	Phase-Out Factor
Pre-Qualifying Year	Once no adjustment exceeds 50%
Year 1	25%
Year 2	33%
Year 3	50%
Year 4	100%

As a class must meet an eligibility requirement before entering Year 1 of the phase-out, the percentages change based on the program year, not the calendar year and different classes may be subject to different phase-out factors. In our example below, the hypothetical multi-residential and commercial classes are in Year 1, while the industrial class has not yet qualified for the phase-out program. If the 2019 capping campaign resulted in all occupied industrial properties being billed at greater than 50% of their CVA tax liability, the industrial class would be eligible for Year 1 treatment in 2019.

The following example has been prepared to illustrate how the phase-out will work in its simplest form. We have used the property with the lowest tax level in each class in order to illustrate how both eligibility for the phase-out and the phase-out itself function.

Illustrative Eligibility and Phase-Out Model

Capping Calculation Elements	Capped / Increasing Properties		
	Multi-Residential	Commercial	Industrial
2018 CVA Tax	\$9,000	\$9,000	\$9,000
2018 Capped Tax	\$5,000	\$8,065	\$4,000
2018 Tax Level	55%	90%	44%
2019 CVA Tax	\$9,500	\$9,500	\$9,500
Maximum Increase (10% Limit)	\$500	\$807	\$400
Pre Phase-Out Maximum Tax	\$5,500	\$8,872	\$4,400
Pre Phase-Out Billing Adjustment	-\$4,000	-\$628	-\$5,100
Threshold Test - \$500	No	No	No
Eligible for Capping Phase-Out*	Yes	Yes	No
Phase-Out Factor	25%	25%	-
Capping Phase-Out Adjustment	\$1,000	\$157	-
Final Billing Adjustment	-\$3,000	-\$471	-\$5,100
Final Capped Tax	\$6,500	\$9,029	\$4,400

**Eligibility determination made at the class, not the property level*

The option to allow current reassessment cycle increases to flow-through functions in a manner quite similar to the phase-out tool in that it layers on an additional tax increase for eligible properties after the core capping calculation has been completed.

With the traditional capping calculation, we adjust based on the relationship between the previous year's actual capped (base) tax and the current year's CVA (destination) tax. To effectively allow current cycle increases to flow-through, while continuing to provide mitigation for prior cycle increases, this new tool considers the tax change that would have occurred if the property had not been capped. The basic mechanics of this tool can be best explained by using the multi-residential property above as an illustrative example. In this simplified model, we have considered the difference between how two identical properties would experience the current cycle reassessment change if one was capped in 2018 and the other was already at its CVA tax destination.

Illustrative Example: Current Cycle Increase Flow-Through

	No 2018 Capping	Capped in 2018	
		No Flow- Through	Flow- Through
2018 CVA Tax	\$9,000	\$9,000	\$9,000
2018 Capped Tax	\$9,000	\$5,000	\$5,000
2019 CVA Tax	\$9,500	\$9,500	\$9,500
CVA Tax Change	\$500	\$500	\$500
Amount Subject to Capping	\$0	\$4,500	\$4,500
Pre Flow-Through Billing Adjustment	\$0	-\$3,000	-\$3,000
Pre Flow-Through Adjusted Tax	\$9,500	\$6,500	\$6,500
Current Cycle Flow-Through	-	-	\$500
Final Billing Adjustment	\$0	-\$3,000	-\$2,500
Final Capped Tax	\$9,500	\$6,500	\$7,000

As with all capping calculations there are a number of complications and nuances that the Provincial regulations impose, however, the general phase-out and flow-through mechanisms will see the final billing adjustments for increasing properties reduced after the traditional capping calculations have been completed. Where a property is deemed eligible for a phase-out, that adjustment will be the last step in the calculation and the threshold test will not be re-applied.

No Final Threshold Test for Increasing/Capped Properties

The manner in which the threshold will be applied for increasing properties is illustrated in our commercial class example above where the Pre Phase-Out billing adjustment does not meet the threshold test but the final billing adjustment does. Even though the final billing adjustment is less than \$500, we do not move the property to CVA tax after the phase-out has been applied. The logic behind this is that a taxpayer should not be moved too many steps in one year. The logic/reasoning does not give consideration to the movement of decreasing/clawed back properties, which might otherwise benefit from the increasing threshold being applied as a final test.

Understanding the Municipality's Capping Dynamics

In light of the significant number of capping options, an even broader range of possible combinations, and the potential for revenue shortfalls to materialize, undertaking a comprehensive pro forma capping analysis is an educational exercise that remains a critical element of Council's annual tax policy decision making process.

To document the implications of the options available to the municipality, MTE has modelled the effects of different combinations of these tools in an effort to ensure that these capping options are given comprehensive treatment and consideration as part of the 2018 tax policy development process.

The pro forma capping models that have been produced and presented in this section of the report are intended to give the reader an understanding as to how the overall capping dynamic will be manifested in each eligible property class this year. The models have been prepared on the following basis:

1. 2018 (final) capped tax figures are employed as the "previous year's base taxes";
2. 2019 CVA taxes are determined by applying revenue neutral tax rates for municipal purposes and 2018 actual education tax rates against the 2019 phased CVA for each property; and
3. Overall levy change is set at zero, as revenue neutral tax rates are employed.

While these results remain speculative in light of the outstanding details regarding how each specific test will be operationalized, they will provide the municipality with some valuable preliminary indications as to the potential capping outcomes for 2019, including:

1. Which, if any, classes the municipality may be able to opt-out of capping completely;
2. Which classes may be eligible for the initiation of a four-year phase-out;
3. The progress of the local capping program, where protection remains mandatory;
4. How the enhanced parameters may be applied to further accelerate properties to their full CVA tax; and
5. Where preliminary results indicate undesirable, or less than ideal outcomes could materialize as part of the actual 2018 capping campaign, this "early warning" allows for the exploration and modelling of alternative options and/or cost recovery strategies.

Preliminary Pro forma Results

As the availability of some policy options depends on the current or anticipated state of the local capping program, Table 42 has been prepared to summarize what the municipality's range of options may be for 2019.

Table 42
2019 Capping Options

	Multi-Residential	Commercial	Industrial
<i>Full Opt-Out</i>			
Number of Properties Protected for 2018	0	2	0
Anticipated Protected Property Count for 2019	0	0	0
Eligible for Full / Immediate Opt-Out	✓	x	✓
<i>Program Phase-Out</i>			
Minimum Tax Level in 2018	-	92%	-
Eligible for Four-Year Phase-Out	-	Y3	-
<i>Flow-Through Current Cycle Increase</i>			
	-	✓	-
<i>Calculation Parameters and Limits</i>			
0% - 10% of Prior Year's CVA Tax Limit	-	✓	-
5% - 10% of Prior Year's Capped Tax Limit	-	✓	-
\$0 - \$500 Threshold: Increasing Properties	-	✓	-
\$0 - \$500 Threshold: Decreasing Properties	-	✓	-
<i>Property Specific Exclusions</i>			
At CVA Tax Exclusion Option	-	✓	-
Cross CVA Tax Exclusion – Claw-back to Cap	-	✓	-
Cross CVA Tax Exclusion – Cap to Claw-back	-	✓	-
<i>Cost Recovery</i>			
Claw-back	-	✓	-
Forgone Revenue	-	✓	-

The Region has already opted out of capping for multi-residential class and will be able to opt out of the industrial class in 2019. Pro forma results for the commercial class are contained in Table 43. The first column summarizes the 2018 actual capping results at the time that the cap was run for final billing. The second column represents a 2019 pro forma model based on the recommended mix of capping tools for 2019.

Table 43
2019 Pro Forma Capping

	Commercial	
	2018 Actual	2019 Pro Forma
Class Level Opt-Out	Not Eligible	Not Eligible
Capping Phase-Out	Y2	Y3
Flow-Through Current Cycle Increase	Yes	Yes
Annualized Tax Limit	10%	10%
Prior Year CVA Tax Limit	10%	10%
CVA Tax Threshold – Increases	\$500	\$500
CVA Tax Threshold – Decreases	\$50	\$50
At CVA Tax Exclusion Option	Yes	Yes
Cross CVA Tax Exclusion: CB to Cap	Yes	Yes
Cross CVA Tax Exclusion: Cap to CB	Yes	Yes
Cost of Capping Protection	\$5,570	\$0
Decrease Retained	97.4%	100%
Decrease Clawed Back	2.5%	0%
Net Class Impact	\$0	\$0
Number of Properties Capped	2	0
Number of Properties Clawed Back	19	0

Pro Forma Commentary

It is anticipated that all properties in the commercial class will reach full CVA tax in 2019, allowing the Region to opt out of capping entirely for 2020.

PART EIGHT: GENERAL SUMMARY AND NEXT STEPS

PURPOSE AND SCOPE

The following notes, commentary and suggestions represent a compilation of the observations and thoughts that arose throughout the preparation and review of this report. This qualitative content does not represent a comprehensive commentary on any issue and it is not intended to be provided as policy advice. No financial, taxation or municipal policy decisions should be made on the basis of these comments; they are intended only as general observations, which may or may not be of interest to the reader.

ASSESSMENT AND REVENUE GROWTH

The Region's assessment and revenue growth remained steady in 2018 with the regional general levy revenue growth standing at 1.61% which is similar to last year's growth of 1.58%.

This is in part driven by positive growth trends and efforts to update/correct the assessment roll throughout the year. This may also be impacted by the new ARB rules and scheduling protocols, which are putting appeal matters off further into the assessment cycle than in the past. The municipality is advised to monitor assessment and taxes at risk closely.

BUSINESS TAX CAPPING

The Region's commercial class will remain subject to business tax capping rules for 2019, however, there is the potential that the commercial class will see no actual adjustments. If this materializes, the commercial class will be eligible for full exclusion in 2020.

POTENTIAL FOR PROVINCIAL TAX POLICY CHANGES

As of publication the new Provincial Government has been virtually silent on municipal finance matters which could mean that no significant changes are being contemplated for 2019, however, in the absence of any information we must be prepared for any matter of change or adjustment. Should any changes be announced, the contents of this study will provide a solid baseline against which local impacts can be measured.

Decision makers should also be well informed of the potential for Provincial tax policy changes. Additional care should be taken in announcing any tax outcomes for the coming year.

RECOMMENDED NEXT STEPS

- 1) It is recommended that specific tax policy options be modelled and considered with care before any annual decisions are made. For 2019 we also recommend that no final decisions be put before Council prior to receiving word from the Province with regards to their 2019 tax policy intentions.
- 2) Staff will want to keep a keen eye on any Provincial policy changes or suggestions in respect of multi-residential treatment or tax policy rules in general for 2019. MTE will keep the Region informed as we become aware of any information in this regard.
- 3) The municipality may wish to update the education levy results contained herein once final decisions have been announced in regards to those levies for 2019.

- 4) Where specific tax policy challenges or pressures are anticipated, early attention should be devoted in order to effectively address and understand any potential challenges, opportunities and/or tax implications.
- 5) Staff are also encouraged to take steps necessary to ensure that both Council and the public are well informed regarding base line tax impacts and any implications related to potential policy change. MTE would be pleased to provide any level or type of support that may be deemed appropriate and/or necessary in this regard.

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Fort Erie</i>		2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	3,340,920,372	3,434,792,472	93,872,100	2.81%	
Farm	59,595,600	56,455,300	-3,140,300	-5.27%	
Managed Forest	1,212,400	1,461,200	248,800	20.52%	
New Multi-Residential	47,900	47,900	0	0.00%	
Multi-Residential	40,015,400	40,015,400	0	0.00%	
Commercial	272,240,409	269,280,809	-2,959,600	-1.09%	
Industrial	48,992,791	49,745,291	752,500	1.54%	
Pipeline	15,286,000	15,468,000	182,000	1.19%	
Sub-Total: Taxable	3,778,310,872	3,867,266,372	88,955,500	2.35%	
<i>Payment In Lieu</i>					
Residential	1,111,500	1,111,500	0	0.00%	
Commercial	13,166,900	12,156,900	-1,010,000	-7.67%	
Industrial	54,000	54,000	0	0.00%	
Sub-Total: Payment In Lieu	14,332,400	13,322,400	-1,010,000	-7.05%	
Total (Taxable + PIL)	3,792,643,272	3,880,588,772	87,945,500	2.32%	

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>Fort Erie</i>	2017 Full CVA Growth		2018 Full CVA Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	46,944,482	1.43%	93,872,100	2.81%
Farm	-491,100	-0.82%	-3,140,300	-5.27%
Managed Forest	-63,300	-4.96%	248,800	20.52%
New Multi-Residential	0	0.00%	0	0.00%
Multi-Residential	0	0.00%	0	0.00%
Commercial	1,395,309	0.52%	-2,959,600	-1.09%
Industrial	388,391	0.80%	752,500	1.54%
Pipeline	222,000	1.47%	182,000	1.19%
Sub-Total: Taxable	48,395,782	1.30%	88,955,500	2.35%
<i>Payment In Lieu</i>				
Residential	0	0.00%	0	0.00%
Commercial	2,447,700	22.83%	-1,010,000	-7.67%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	2,447,700	20.60%	-1,010,000	-7.05%
Total (Taxable + PIL)	50,843,482	1.36%	87,945,500	2.32%

Local Results Table 2
2018 Local Assessment Growth
 (Phase-Adjusted CVA)

<i>Fort Erie</i>		2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	3,191,825,704	3,283,595,985	91,770,281	2.88%	
Farm	54,179,128	51,319,965	-2,859,163	-5.28%	
Managed Forest	1,155,706	1,399,686	243,980	21.11%	
New Multi-Residential	41,450	41,450	0	0.00%	
Multi-Residential	39,400,733	39,400,733	0	0.00%	
Commercial	259,220,846	256,617,503	-2,603,343	-1.00%	
Industrial	47,299,751	48,102,009	802,258	1.70%	
Pipeline	14,593,000	14,766,749	173,749	1.19%	
Sub-Total: Taxable	3,607,716,318	3,695,244,080	87,527,762	2.43%	
<i>Payment In Lieu</i>					
Residential	1,111,000	1,111,000	0	0.00%	
Commercial	12,773,000	11,779,800	-993,200	-7.78%	
Industrial	52,000	52,000	0	0.00%	
Sub-Total: Payment In Lieu	13,936,000	12,942,800	-993,200	-7.13%	
Total (Taxable + PIL)	3,621,652,318	3,708,186,880	86,534,562	2.39%	

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Fort Erie</i>	2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	\$21,851,654	\$22,479,926	\$628,271	2.88%
Farm	\$92,729	\$87,836	-\$4,894	-5.28%
Managed Forest	\$1,978	\$2,396	\$418	21.13%
New Multi-Residential	\$284	\$284	\$0	0.00%
Multi-Residential	\$531,393	\$531,393	\$0	0.00%
Commercial	\$2,992,945	\$2,960,197	-\$32,748	-1.09%
Industrial	\$828,321	\$842,766	\$14,445	1.74%
Pipeline	\$170,049	\$172,074	\$2,025	1.19%
Sub-Total: Taxable	\$26,469,353	\$27,076,872	\$607,517	2.30%
<i>Payment In Lieu</i>				
Residential	\$7,606	\$7,606	\$0	0.00%
Commercial	\$151,709	\$139,912	-\$11,797	-7.78%
Industrial	\$655	\$655	\$0	0.00%
Sub-Total: Payment In Lieu	\$159,970	\$148,173	-\$11,797	-7.37%
Total (Taxable + PIL)	\$26,629,323	\$27,225,045	\$595,720	2.24%

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Fort Erie</i>	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	\$306,405	1.47%	\$628,271	2.88%
Farm	-\$684	-0.78%	-\$4,894	-5.28%
Managed Forest	-\$99	-4.92%	\$418	21.13%
New Multi-Residential	\$0	0.00%	\$0	0.00%
Multi-Residential	\$0	0.00%	\$0	0.00%
Commercial	-\$2,467	-0.08%	-\$32,748	-1.09%
Industrial	\$14,687	1.85%	\$14,445	1.74%
Pipeline	\$2,399	1.48%	\$2,025	1.19%
Sub-Total: Taxable	\$320,241	1.26%	\$607,517	2.30%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	\$0	0.00%
Commercial	\$28,491	23.44%	-\$11,797	-7.78%
Industrial	\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu	\$28,491	21.96%	-\$11,797	-7.37%
Total (Taxable + PIL)	\$348,732	1.37%	\$595,720	2.24%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Fort Erie</i>		Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%	
<i>Taxable</i>					
Residential	3,283,595,985	3,359,194,245	75,598,260	2.30%	
Farm	51,319,965	53,887,634	2,567,669	5.00%	
Managed Forest	1,399,686	1,430,442	30,756	2.20%	
New Multi-Residential	41,450	44,675	3,225	7.78%	
Multi-Residential	39,400,733	39,708,066	307,333	0.78%	
Commercial	256,617,503	262,949,157	6,331,654	2.47%	
Industrial	48,102,009	48,923,650	821,641	1.71%	
Pipeline	14,766,749	15,117,375	350,626	2.37%	
Sub-Total: Taxable	3,695,244,080	3,781,255,244	86,011,164	2.33%	
<i>Payment In Lieu</i>					
Residential	1,111,000	1,111,250	250	0.02%	
Commercial	11,779,800	11,968,350	188,550	1.60%	
Industrial	52,000	53,000	1,000	1.92%	
Sub-Total: Payment In Lieu	12,942,800	13,132,600	189,800	1.47%	
Total (Taxable + PIL)	3,708,186,880	3,794,387,844	86,200,964	2.32%	

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>Fort Erie</i> Realty Tax Class	-----Tax Ratios-----		-----Tax Rates-----	
	2018 Actual	2019 Start Ratio	Change %	2018 Actual 2019 Revenue Netural (Notional)
<i>Taxable</i>				
Residential	1.000000	1.000000	0.00%	0.00684613 0.00669430 -2.22%
Farm	0.250000	0.250000	0.00%	0.00171153 0.00167358 -2.22%
Managed Forest	0.250000	0.250000	0.00%	0.00171153 0.00167358 -2.22%
New Multi-Residential	1.000000	1.000000	0.00%	0.00684613 0.00669430 -2.22%
Multi-Residential	1.970000	1.970000	0.00%	0.01348688 0.01318777 -2.22%
Commercial	1.734900	1.734900	0.00%	0.01187735 0.01161394 -2.22%
Industrial	2.630000	2.630000	0.00%	0.01800532 0.01760601 -2.22%
Pipeline	1.702100	1.702100	0.00%	0.01165280 0.01139437 -2.22%
Sub-Total of Taxable Levy				\$27,076,872 \$27,076,885 0.00%
<i>Payment In Lieu</i>				
Residential	1.000000	1.000000	0.00%	0.00684613 0.00669430 -2.22%
Commercial	1.734900	1.734900	0.00%	0.01187735 0.01161394 -2.22%
Industrial	2.630000	2.630000	0.00%	0.01800532 0.01760601 -2.22%
Sub-Total of Payment In Lieu Levy				\$148,173 \$147,092 -0.73%
Total Taxable + PIL Levies Based on Rate Set				\$27,225,045 \$27,223,977 0.00%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.



Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Fort Erie</i>		Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$22,479,926	\$22,487,454	\$7,528	0.03%	
Farm	\$87,836	\$90,185	\$2,349	2.67%	
Managed Forest	\$2,396	\$2,394	-\$2	-0.08%	
New Multi-Residential	\$284	\$299	\$15	5.28%	
Multi-Residential	\$531,393	\$523,661	-\$7,732	-1.46%	
Commercial	\$2,960,197	\$2,965,441	\$5,244	0.18%	
Industrial	\$842,766	\$835,198	-\$7,568	-0.90%	
Pipeline	\$172,074	\$172,253	\$179	0.10%	
Sub-Total: Taxable	\$27,076,872	\$27,076,885	\$13	0.00%	
<i>Payment In Lieu</i>					
Residential	\$7,606	\$7,439	-\$167	-2.20%	
Commercial	\$139,912	\$139,000	-\$912	-0.65%	
Industrial	\$655	\$653	-\$2	-0.31%	
Sub-Total: Payment In Lieu	\$148,173	\$147,092	-\$1,081	-0.73%	
Total (Taxable + PIL)	\$27,225,045	\$27,223,977	-\$1,068	0.00%	

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Fort Erie</i>		Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$18,620,583	\$18,331,694	-\$288,889	-1.55%	
Farm	\$72,756	\$73,518	\$762	1.05%	
Managed Forest	\$1,984	\$1,952	-\$32	-1.61%	
New Multi-Residential	\$235	\$244	\$9	3.83%	
Multi-Residential	\$440,164	\$426,886	-\$13,278	-3.02%	
Commercial	\$2,451,993	\$2,417,415	-\$34,578	-1.41%	
Industrial	\$698,081	\$680,850	-\$17,231	-2.47%	
Pipeline	\$142,532	\$140,420	-\$2,112	-1.48%	
Sub-Total: Taxable	\$22,428,328	\$22,072,979	-\$355,349	-1.58%	
<i>Payment In Lieu</i>					
Residential	\$6,300	\$6,064	-\$236	-3.75%	
Commercial	\$115,893	\$113,311	-\$2,582	-2.23%	
Industrial	\$543	\$532	-\$11	-2.03%	
Sub-Total: Payment In Lieu	\$122,736	\$119,907	-\$2,829	-2.30%	
Total (Taxable + PIL)	\$22,551,064	\$22,192,886	-\$358,178	-1.59%	

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Fort Erie</i>		Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$41,100,509	\$40,819,148	-\$281,361	-0.68%	
Farm	\$160,592	\$163,703	\$3,111	1.94%	
Managed Forest	\$4,380	\$4,346	-\$34	-0.78%	
New Multi-Residential	\$519	\$543	\$24	4.62%	
Multi-Residential	\$971,557	\$950,547	-\$21,010	-2.16%	
Commercial	\$5,412,190	\$5,382,856	-\$29,334	-0.54%	
Industrial	\$1,540,847	\$1,516,048	-\$24,799	-1.61%	
Pipeline	\$314,606	\$312,673	-\$1,933	-0.61%	
Sub-Total: Taxable	\$49,505,200	\$49,149,864	-\$355,336	-0.72%	
<i>Payment In Lieu</i>					
Residential	\$13,906	\$13,503	-\$403	-2.90%	
Commercial	\$255,805	\$252,311	-\$3,494	-1.37%	
Industrial	\$1,198	\$1,185	-\$13	-1.09%	
Sub-Total: Payment In Lieu	\$270,909	\$266,999	-\$3,910	-1.44%	
Total (Taxable + PIL)	\$49,776,109	\$49,416,863	-\$359,246	-0.72%	

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Grimsby</i>	2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	4,144,665,522	4,274,136,031	129,470,509	3.12%
Farm	92,321,395	90,563,795	-1,757,600	-1.90%
Managed Forest	907,400	913,800	6,400	0.71%
Multi-Residential	29,469,000	29,772,000	303,000	1.03%
Commercial	349,888,500	359,891,900	10,003,400	2.86%
Industrial	53,036,400	56,906,800	3,870,400	7.30%
Pipeline	7,741,000	7,831,000	90,000	1.16%
Sub-Total: Taxable	4,678,029,217	4,820,015,326	141,986,109	3.04%
<i>Payment In Lieu</i>				
Residential	4,797,300	4,797,300	0	0.00%
Commercial	35,211,700	35,211,700	0	0.00%
Industrial	80,800	80,800	0	0.00%
Sub-Total: Payment In Lieu	40,089,800	40,089,800	0	0.00%
Total (Taxable + PIL)	4,718,119,017	4,860,105,126	141,986,109	3.01%

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>Grimsby</i>	2017 Full CVA Growth		2018 Full CVA Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	72,279,723	1.77%	129,470,509	3.12%
Farm	1,802,895	1.99%	-1,757,600	-1.90%
Managed Forest	0	0.00%	6,400	0.71%
Multi-Residential	2,151,000	7.87%	303,000	1.03%
Commercial	-9,909,300	-2.75%	10,003,400	2.86%
Industrial	-3,659,200	-6.45%	3,870,400	7.30%
Pipeline	-12,000	-0.15%	90,000	1.16%
Sub-Total: Taxable	62,653,118	1.36%	141,986,109	3.04%
<i>Payment In Lieu</i>				
Residential	0	0.00%	0	0.00%
Commercial	0	0.00%	0	0.00%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	0	0.00%	0	0.00%
Total (Taxable + PIL)	62,653,118	1.35%	141,986,109	3.01%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>Grimsby</i>	2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	3,719,249,292	3,836,277,963	117,028,671	3.15%
Farm	77,100,310	75,700,412	-1,399,898	-1.82%
Managed Forest	763,200	769,196	5,996	0.79%
Multi-Residential	28,062,758	28,202,445	139,687	0.50%
Commercial	299,143,522	307,399,787	8,256,265	2.76%
Industrial	45,613,945	49,011,380	3,397,435	7.45%
Pipeline	7,443,961	7,530,507	86,546	1.16%
Sub-Total: Taxable	4,177,376,988	4,304,891,690	127,514,702	3.05%
<i>Payment In Lieu</i>				
Residential	3,965,750	3,965,750	0	0.00%
Commercial	28,499,350	28,499,350	0	0.00%
Industrial	55,450	55,450	0	0.00%
Sub-Total: Payment In Lieu	32,520,550	32,520,550	0	0.00%
Total (Taxable + PIL)	4,209,897,538	4,337,412,240	127,514,702	3.03%

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Grimsby</i>	2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	\$9,247,779	\$9,539,167	\$291,388	3.15%
Farm	\$47,993	\$47,121	-\$871	-1.81%
Managed Forest	\$475	\$479	\$4	0.84%
Multi-Residential	\$137,650	\$138,335	\$685	0.50%
Commercial	\$1,263,413	\$1,298,006	\$34,594	2.74%
Industrial	\$290,063	\$309,834	\$19,771	6.82%
Pipeline	\$31,548	\$31,915	\$367	1.16%
Sub-Total: Taxable	\$11,018,921	\$11,364,857	\$345,938	3.14%
<i>Payment In Lieu</i>				
Residential	\$9,874	\$9,874	\$0	0.00%
Commercial	\$114,451	\$114,451	\$0	0.00%
Industrial	\$363	\$363	\$0	0.00%
Sub-Total: Payment In Lieu	\$124,688	\$124,688	\$0	0.00%
Total (Taxable + PIL)	\$11,143,609	\$11,489,545	\$345,938	3.10%

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Grimsby</i>				
Realty Tax Class	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	\$157,766	1.81%	\$291,388	3.15%
Farm	\$1,081	2.52%	-\$871	-1.81%
Managed Forest	\$0	0.00%	\$4	0.84%
Multi-Residential	\$10,307	8.04%	\$685	0.50%
Commercial	-\$32,077	-2.62%	\$34,594	2.74%
Industrial	-\$14,582	-5.09%	\$19,771	6.82%
Pipeline	-\$49	-0.16%	\$367	1.16%
Sub-Total: Taxable	\$122,446	1.17%	\$345,938	3.14%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	\$0	0.00%
Commercial	\$0	0.00%	\$0	0.00%
Industrial	\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu	\$0	0.00%	\$0	0.00%
Total (Taxable + PIL)	\$122,446	1.16%	\$345,938	3.10%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Grimsby</i>	Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	3,836,277,963	4,055,206,983	218,929,020	5.71%
Farm	75,700,412	83,132,103	7,431,691	9.82%
Managed Forest	769,196	841,498	72,302	9.40%
Multi-Residential	28,202,445	28,987,222	784,777	2.78%
Commercial	307,399,787	333,645,846	26,246,059	8.54%
Industrial	49,011,380	52,959,089	3,947,709	8.05%
Pipeline	7,530,507	7,680,754	150,247	2.00%
Sub-Total: Taxable	4,304,891,690	4,562,453,495	257,561,805	5.98%
<i>Payment In Lieu</i>				
Residential	3,965,750	4,381,525	415,775	10.48%
Commercial	28,499,350	31,855,525	3,356,175	11.78%
Industrial	55,450	68,125	12,675	22.86%
Sub-Total: Payment In Lieu	32,520,550	36,305,175	3,784,625	11.64%
Total (Taxable + PIL)	4,337,412,240	4,598,758,670	261,346,430	6.03%

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

-----Tax Ratios-----		-----Tax Rates-----				
Realty Tax Class	2018 Actual	2019 Start Ratio	Change %	2018 Actual	2019 Revenue Neutral (Notional)	Change %
<i>Taxable</i>						
Residential	1.000000	1.000000	0.00%	0.00248988	0.00234799	-5.70%
Farm	0.250000	0.250000	0.00%	0.00062247	0.00058700	-5.70%
Managed Forest	0.250000	0.250000	0.00%	0.00062247	0.00058700	-5.70%
Multi-Residential	1.970000	1.970000	0.00%	0.00490507	0.00462554	-5.70%
Commercial	1.734900	1.734900	0.00%	0.00431970	0.00407353	-5.70%
Industrial	2.630000	2.630000	0.00%	0.00654839	0.00617521	-5.70%
Pipeline	1.702100	1.702100	0.00%	0.00423803	0.00399651	-5.70%
Sub-Total of Taxable Levy				\$11,364,857	\$11,364,863	0.00%
<i>Payment In Lieu</i>						
Residential	1.000000	1.000000	0.00%	0.00248988	0.00234799	-5.70%
Commercial	1.734900	1.734900	0.00%	0.00431970	0.00407353	-5.70%
Industrial	2.630000	2.630000	0.00%	0.00654839	0.00617521	-5.70%
Sub-Total of Payment In Lieu Levy				\$124,688	\$131,433	5.41%
Total Taxable + PIL Levies Based on Rate Set				\$11,489,545	\$11,496,296	0.06%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Grimsby</i>	Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$9,539,167	\$9,509,050	-\$30,117	-0.32%
Farm	\$47,121	\$48,799	\$1,678	3.56%
Managed Forest	\$479	\$494	\$15	3.13%
Multi-Residential	\$138,335	\$134,082	-\$4,253	-3.07%
Commercial	\$1,298,006	\$1,326,848	\$28,842	2.22%
Industrial	\$309,834	\$314,894	\$5,060	1.63%
Pipeline	\$31,915	\$30,696	-\$1,219	-3.82%
Sub-Total: Taxable	\$11,364,857	\$11,364,863	\$6	0.00%
<i>Payment In Lieu</i>				
Residential	\$9,874	\$10,288	\$414	4.19%
Commercial	\$114,451	\$120,724	\$6,273	5.48%
Industrial	\$363	\$421	\$58	15.98%
Sub-Total: Payment In Lieu	\$124,688	\$131,433	\$6,745	5.41%
Total (Taxable + PIL)	\$11,489,545	\$11,496,296	\$6,751	0.06%

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Grimsby</i>	Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$21,725,791	\$22,100,819	\$375,028	1.73%
Farm	\$107,320	\$113,416	\$6,096	5.68%
Managed Forest	\$1,090	\$1,148	\$58	5.32%
Multi-Residential	\$315,062	\$311,631	-\$3,431	-1.09%
Commercial	\$2,956,251	\$3,083,842	\$127,591	4.32%
Industrial	\$705,657	\$731,876	\$26,219	3.72%
Pipeline	\$72,686	\$71,344	-\$1,342	-1.85%
Sub-Total: Taxable	\$25,883,857	\$26,414,076	\$530,219	2.05%
<i>Payment In Lieu</i>				
Residential	\$22,489	\$23,911	\$1,422	6.32%
Commercial	\$260,665	\$280,588	\$19,923	7.64%
Industrial	\$827	\$978	\$151	18.26%
Sub-Total: Payment In Lieu	\$283,981	\$305,477	\$21,496	7.57%
Total (Taxable + PIL)	\$26,167,838	\$26,719,553	\$551,715	2.11%

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Grimsby</i>	Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$31,264,958	\$31,609,869	\$344,911	1.10%
Farm	\$154,441	\$162,215	\$7,774	5.03%
Managed Forest	\$1,569	\$1,642	\$73	4.65%
Multi-Residential	\$453,397	\$445,713	-\$7,684	-1.69%
Commercial	\$4,254,257	\$4,410,690	\$156,433	3.68%
Industrial	\$1,015,491	\$1,046,770	\$31,279	3.08%
Pipeline	\$104,601	\$102,040	-\$2,561	-2.45%
Sub-Total: Taxable	\$37,248,714	\$37,778,939	\$530,225	1.42%
<i>Payment In Lieu</i>				
Residential	\$32,363	\$34,199	\$1,836	5.67%
Commercial	\$375,116	\$401,312	\$26,196	6.98%
Industrial	\$1,190	\$1,399	\$209	17.56%
Sub-Total: Payment In Lieu	\$408,669	\$436,910	\$28,241	6.91%
Total (Taxable + PIL)	\$37,657,383	\$38,215,849	\$558,466	1.48%

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Lincoln</i>	2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	3,038,939,656	3,090,842,665	51,903,009	1.71%
Farm	538,161,200	524,850,700	-13,310,500	-2.47%
Managed Forest	1,024,100	1,024,100	0	0.00%
Multi-Residential	22,996,000	21,808,500	-1,187,500	-5.16%
Commercial	219,369,900	220,776,700	1,406,800	0.64%
Industrial	104,898,000	105,122,600	224,600	0.21%
Pipeline	20,572,000	20,580,000	8,000	0.04%
Sub-Total: Taxable	3,945,960,856	3,985,005,265	39,044,409	0.99%
<i>Payment In Lieu</i>				
Residential	5,320,200	5,320,200	0	0.00%
Commercial	17,969,900	18,195,900	226,000	1.26%
Industrial	2,131,500	2,131,500	0	0.00%
Sub-Total: Payment In Lieu	25,421,600	25,647,600	226,000	0.89%
Total (Taxable + PIL)	3,971,382,456	4,010,652,865	39,270,409	0.99%

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>Lincoln</i>	2017 Full CVA Growth		2018 Full CVA Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	35,676,920	1.19%	51,903,009	1.71%
Farm	2,966,000	0.55%	-13,310,500	-2.47%
Managed Forest	75,900	8.00%	0	0.00%
Multi-Residential	-813,000	-3.41%	-1,187,500	-5.16%
Commercial	117,400	0.05%	1,406,800	0.64%
Industrial	1,275,300	1.23%	224,600	0.21%
Pipeline	60,000	0.29%	8,000	0.04%
Sub-Total: Taxable	39,358,520	1.01%	39,044,409	0.99%
<i>Payment In Lieu</i>				
Residential	0	0.00%	0	0.00%
Commercial	0	0.00%	226,000	1.26%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	0	0.00%	226,000	0.89%
Total (Taxable + PIL)	39,358,520	1.00%	39,270,409	0.99%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>Lincoln</i>	2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	2,776,672,062	2,825,453,252	48,781,190	1.76%
Farm	445,646,389	434,728,211	-10,918,178	-2.45%
Managed Forest	877,352	877,352	0	0.00%
Multi-Residential	20,968,650	19,991,400	-977,250	-4.66%
Commercial	202,418,299	203,881,217	1,462,918	0.72%
Industrial	98,795,528	99,107,189	311,661	0.32%
Pipeline	19,422,000	19,429,618	7,618	0.04%
Sub-Total: Taxable	3,564,800,280	3,603,468,239	38,667,959	1.08%
<i>Payment In Lieu</i>				
Residential	4,661,900	4,661,900	0	0.00%
Commercial	15,825,350	16,051,350	226,000	1.43%
Industrial	1,641,250	1,641,250	0	0.00%
Sub-Total: Payment In Lieu	22,128,500	22,354,500	226,000	1.02%
Total (Taxable + PIL)	3,586,928,780	3,625,822,739	38,893,959	1.08%

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Lincoln</i>	2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	\$11,838,702	\$12,046,687	\$207,985	1.76%
Farm	\$475,019	\$463,381	-\$11,638	-2.45%
Managed Forest	\$935	\$935	\$0	0.00%
Multi-Residential	\$176,123	\$167,915	-\$8,208	-4.66%
Commercial	\$1,462,780	\$1,473,250	\$10,470	0.72%
Industrial	\$1,074,696	\$1,077,714	\$3,018	0.28%
Pipeline	\$140,948	\$141,003	\$55	0.04%
Sub-Total: Taxable	\$15,169,203	\$15,370,885	\$201,682	1.33%
<i>Payment In Lieu</i>				
Residential	\$19,876	\$19,876	\$0	0.00%
Commercial	\$117,060	\$118,731	\$1,672	1.43%
Industrial	\$16,775	\$16,775	\$0	0.00%
Sub-Total: Payment In Lieu	\$153,711	\$155,382	\$1,672	1.09%
Total (Taxable + PIL)	\$15,322,914	\$15,526,267	\$203,354	1.33%

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Lincoln</i>				
Realty Tax Class	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	\$150,163	1.36%	\$207,985	1.76%
Farm	\$3,214	0.77%	-\$11,638	-2.45%
Managed Forest	\$57	7.19%	\$0	0.00%
Multi-Residential	-\$5,502	-3.16%	-\$8,208	-4.66%
Commercial	\$5,670	0.40%	\$10,470	0.72%
Industrial	\$9,551	0.93%	\$3,018	0.28%
Pipeline	\$395	0.29%	\$55	0.04%
Sub-Total: Taxable	\$163,548	1.15%	\$201,682	1.33%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	\$0	0.00%
Commercial	\$0	0.00%	\$1,672	1.43%
Industrial	-\$237	-1.65%	\$0	0.00%
Sub-Total: Payment In Lieu	-\$237	-0.17%	\$1,672	1.09%
Total (Taxable + PIL)	\$163,311	1.14%	\$203,354	1.33%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Lincoln</i>	Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	2,825,453,252	2,958,147,963	132,694,711	4.70%
Farm	434,728,211	479,789,455	45,061,244	10.37%
Managed Forest	877,352	950,726	73,374	8.36%
Multi-Residential	19,991,400	20,899,950	908,550	4.54%
Commercial	203,881,217	212,328,963	8,447,746	4.14%
Industrial	99,107,189	102,114,895	3,007,706	3.03%
Pipeline	19,429,618	20,004,809	575,191	2.96%
Sub-Total: Taxable	3,603,468,239	3,794,236,761	190,768,522	5.29%
<i>Payment In Lieu</i>				
Residential	4,661,900	4,991,050	329,150	7.06%
Commercial	16,051,350	17,123,625	1,072,275	6.68%
Industrial	1,641,250	1,886,375	245,125	14.94%
Sub-Total: Payment In Lieu	22,354,500	24,001,050	1,646,550	7.37%
Total (Taxable + PIL)	3,625,822,739	3,818,237,811	192,415,072	5.31%

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>Lincoln</i> Realty Tax Class	Tax Ratios		Tax Rates		Change %
	2018 Actual	2019 Start Ratio	2018 Actual	2019 Revenue Neutral (Notional)	
<i>Taxable</i>					
Residential	1.000000	1.000000	0.00426363	0.00407361	-4.46%
Farm	0.250000	0.250000	0.00106591	0.00101840	-4.46%
Managed Forest	0.250000	0.250000	0.00106591	0.00101840	-4.46%
Multi-Residential	1.970000	1.970000	0.00839936	0.00802501	-4.46%
Commercial	1.734900	1.734900	0.00739698	0.00706731	-4.46%
Industrial	2.630000	2.630000	0.01121336	0.01071359	-4.46%
Pipeline	1.702100	1.702100	0.00725713	0.00693369	-4.46%
Sub-Total of Taxable Levy			\$15,370,885	\$15,370,870	0.00%
<i>Payment In Lieu</i>					
Residential	1.000000	1.000000	0.00426363	0.00407361	-4.46%
Commercial	1.734900	1.734900	0.00739698	0.00706731	-4.46%
Industrial	2.630000	2.630000	0.01121336	0.01071359	-4.46%
Sub-Total of Payment In Lieu Levy			\$155,382	\$159,763	2.82%
Total Taxable + PIL Levies Based on Rate Set			\$15,526,267	\$15,530,633	0.03%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Lincoln</i>	Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$12,046,687	\$12,050,341	\$3,654	0.03%
Farm	\$463,381	\$488,618	\$25,237	5.45%
Managed Forest	\$935	\$968	\$33	3.53%
Multi-Residential	\$167,915	\$167,722	-\$193	-0.11%
Commercial	\$1,473,250	\$1,465,054	-\$8,196	-0.56%
Industrial	\$1,077,714	\$1,059,460	-\$18,254	-1.69%
Pipeline	\$141,003	\$138,707	-\$2,296	-1.63%
Sub-Total: Taxable	\$15,370,885	\$15,370,870	-\$15	0.00%
<i>Payment In Lieu</i>				
Residential	\$19,876	\$20,331	\$455	2.29%
Commercial	\$118,731	\$121,018	\$2,287	1.93%
Industrial	\$16,775	\$18,414	\$1,639	9.77%
Sub-Total: Payment In Lieu	\$155,382	\$159,763	\$4,381	2.82%
Total (Taxable + PIL)	\$15,526,267	\$15,530,633	\$4,366	0.03%

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Lincoln</i> Realty Tax Class	Upper-Tier General Levy		Change	
	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$16,022,552	\$16,143,116	\$120,564	0.75%
Farm	\$616,314	\$654,572	\$38,258	6.21%
Managed Forest	\$1,244	\$1,297	\$53	4.26%
Multi-Residential	\$223,333	\$224,687	\$1,354	0.61%
Commercial	\$1,959,475	\$1,962,642	\$3,167	0.16%
Industrial	\$1,433,399	\$1,419,295	-\$14,104	-0.98%
Pipeline	\$187,540	\$185,818	-\$1,722	-0.92%
Sub-Total: Taxable	\$20,443,857	\$20,591,427	\$147,570	0.72%
<i>Payment In Lieu</i>				
Residential	\$26,437	\$27,237	\$800	3.03%
Commercial	\$157,917	\$162,120	\$4,203	2.66%
Industrial	\$22,313	\$24,667	\$2,354	10.55%
Sub-Total: Payment In Lieu	\$206,667	\$214,024	\$7,357	3.56%
Total (Taxable + PIL)	\$20,650,524	\$20,805,451	\$154,927	0.75%

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Lincoln</i>	Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$28,069,239	\$28,193,457	\$124,218	0.44%
Farm	\$1,079,695	\$1,143,190	\$63,495	5.88%
Managed Forest	\$2,179	\$2,265	\$86	3.95%
Multi-Residential	\$391,248	\$392,409	\$1,161	0.30%
Commercial	\$3,432,725	\$3,427,696	-\$5,029	-0.15%
Industrial	\$2,511,113	\$2,478,755	-\$32,358	-1.29%
Pipeline	\$328,543	\$324,525	-\$4,018	-1.22%
Sub-Total: Taxable	\$35,814,742	\$35,962,297	\$147,555	0.41%
<i>Payment In Lieu</i>				
Residential	\$46,313	\$47,568	\$1,255	2.71%
Commercial	\$276,648	\$283,138	\$6,490	2.35%
Industrial	\$39,088	\$43,081	\$3,993	10.22%
Sub-Total: Payment In Lieu	\$362,049	\$373,787	\$11,738	3.24%
Total (Taxable + PIL)	\$36,176,791	\$36,336,084	\$159,293	0.44%

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Niagara Falls</i>		2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	8,396,305,518	8,649,976,918	253,671,400	3.02%	
Farm	91,092,000	87,909,600	-3,182,400	-3.49%	
Managed Forest	1,328,900	1,285,400	-43,500	-3.27%	
New Multi-Residential	10,875,500	10,875,500	0	0.00%	
Multi-Residential	317,187,900	318,844,900	1,657,000	0.52%	
Commercial	2,623,424,600	2,615,800,203	-7,624,397	-0.29%	
Industrial	139,031,700	145,046,700	6,015,000	4.33%	
Landfill	3,152,500	3,152,500	0	0.00%	
Pipeline	44,280,000	44,541,000	261,000	0.59%	
Sub-Total: Taxable	11,626,678,618	11,877,432,721	250,754,103	2.16%	
<i>Payment In Lieu</i>					
Residential	8,314,904	8,278,104	-36,800	-0.44%	
Commercial	408,830,399	406,950,499	-1,879,900	-0.46%	
Industrial	4,336,700	4,336,700	0	0.00%	
Sub-Total: Payment In Lieu	421,482,003	419,565,303	-1,916,700	-0.45%	
Total (Taxable + PIL)	12,048,160,621	12,296,998,024	248,837,403	2.07%	

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

Niagara Falls

Realty Tax Class	2017 Full CVA Growth		2018 Full CVA Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	238,309,500	2.92%	253,671,400	3.02%
Farm	-775,200	-0.84%	-3,182,400	-3.49%
Managed Forest	-10,800	-0.81%	-43,500	-3.27%
New Multi-Residential	0	0.00%	0	0.00%
Multi-Residential	-1,204,000	-0.38%	1,657,000	0.52%
Commercial	34,581,900	1.34%	-7,624,397	-0.29%
Industrial	-5,018,400	-3.48%	6,015,000	4.33%
Landfill	-4,728,500	-60.00%	0	0.00%
Pipeline	347,000	0.79%	261,000	0.59%
Sub-Total: Taxable	261,501,500	2.30%	250,754,103	2.16%
<i>Payment In Lieu</i>				
Residential	0	0.00%	-36,800	-0.44%
Commercial	-1,969,000	-0.48%	-1,879,900	-0.46%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	-1,969,000	-0.46%	-1,916,700	-0.45%
Total (Taxable + PIL)	259,532,500	2.20%	248,837,403	2.07%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>Niagara Falls</i>		2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	7,776,970,360	8,011,639,770	234,669,410	3.02%	
Farm	74,074,020	71,312,416	-2,761,604	-3.73%	
Managed Forest	1,143,800	1,106,600	-37,200	-3.25%	
New Multi-Residential	9,776,820	9,776,820	0	0.00%	
Multi-Residential	289,823,716	291,354,594	1,530,878	0.53%	
Commercial	2,416,962,774	2,409,648,342	-7,314,432	-0.30%	
Industrial	123,768,402	130,046,074	6,277,672	5.07%	
Landfill	3,152,500	3,152,500	0	0.00%	
Pipeline	42,334,000	42,519,092	185,092	0.44%	
Sub-Total: Taxable	10,738,006,392	10,970,556,208	232,549,816	2.17%	
<i>Payment In Lieu</i>					
Residential	6,381,552	6,357,126	-24,426	-0.38%	
Commercial	396,311,400	395,036,364	-1,275,036	-0.32%	
Industrial	3,390,900	3,390,900	0	0.00%	
Sub-Total: Payment In Lieu	406,083,852	404,784,390	-1,299,462	-0.32%	
Total (Taxable + PIL)	11,144,090,244	11,375,340,598	231,250,354	2.08%	

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Niagara Falls</i>		2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	\$35,284,380	\$36,350,268	\$1,065,888	3.02%	
Farm	\$84,113	\$80,977	-\$3,136	-3.73%	
Managed Forest	\$1,299	\$1,257	-\$42	-3.23%	
New Multi-Residential	\$44,407	\$44,407	\$0	0.00%	
Multi-Residential	\$2,593,314	\$2,607,012	\$13,698	0.53%	
Commercial	\$18,607,723	\$18,550,222	-\$57,501	-0.31%	
Industrial	\$1,372,160	\$1,434,171	\$62,009	4.52%	
Landfill	\$42,101	\$42,101	\$0	0.00%	
Pipeline	\$327,287	\$328,718	\$1,431	0.44%	
Sub-Total: Taxable	\$58,356,784	\$59,439,133	\$1,082,347	1.85%	
<i>Payment In Lieu</i>					
Residential	\$28,986	\$28,875	-\$111	-0.38%	
Commercial	\$3,116,158	\$3,106,110	-\$10,047	-0.32%	
Industrial	\$39,537	\$39,537	\$0	0.00%	
Sub-Total: Payment In Lieu	\$3,184,681	\$3,174,522	-\$10,158	-0.32%	
Total (Taxable + PIL)	\$61,541,465	\$62,613,655	\$1,072,189	1.74%	

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Niagara Falls</i>				
Realty Tax Class	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	\$961,510	2.85%	\$1,065,888	3.02%
Farm	-\$491	-0.64%	-\$3,136	-3.73%
Managed Forest	-\$12	-0.97%	-\$42	-3.23%
New Multi-Residential	\$0	0.00%	\$0	0.00%
Multi-Residential	-\$12,089	-0.47%	\$13,698	0.53%
Commercial	\$276,735	1.52%	-\$57,501	-0.31%
Industrial	-\$37,048	-2.72%	\$62,009	4.52%
Landfill	\$0	0.00%	\$0	0.00%
Pipeline	\$2,465	0.76%	\$1,431	0.44%
Sub-Total: Taxable	\$1,191,070	2.12%	\$1,082,347	1.85%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	-\$111	-0.38%
Commercial	\$194,180	6.51%	-\$10,047	-0.32%
Industrial	-\$753	-2.12%	\$0	0.00%
Sub-Total: Payment In Lieu	\$193,427	6.35%	-\$10,158	-0.32%
Total (Taxable + PIL)	\$1,384,497	2.33%	\$1,072,189	1.74%

Local Results Table 4
Year-Over-Year Phase-In Change
(2018 to 2019 Phased CVA)

<i>Niagara Falls</i>		Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%	
<i>Taxable</i>					
Residential	8,011,639,770	8,330,808,344	319,168,574	3.98%	
Farm	71,312,416	79,611,005	8,298,589	11.64%	
Managed Forest	1,106,600	1,196,000	89,400	8.08%	
New Multi-Residential	9,776,820	10,326,160	549,340	5.62%	
Multi-Residential	291,354,594	305,099,748	13,745,154	4.72%	
Commercial	2,409,648,342	2,512,724,285	103,075,943	4.28%	
Industrial	130,046,074	137,546,388	7,500,314	5.77%	
Landfill	3,152,500	3,152,500	0	0.00%	
Pipeline	42,519,092	43,530,046	1,010,954	2.38%	
Sub-Total: Taxable	10,970,556,208	11,423,994,476	453,438,268	4.13%	
<i>Payment In Lieu</i>					
Residential	6,357,126	7,317,615	960,489	15.11%	
Commercial	395,036,364	400,993,431	5,957,067	1.51%	
Industrial	3,390,900	3,863,800	472,900	13.95%	
Sub-Total: Payment In Lieu	404,784,390	412,174,846	7,390,456	1.83%	
Total (Taxable + PIL)	11,375,340,598	11,836,169,322	460,828,724	4.05%	

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>Niagara Falls</i> Realty Tax Class	-----Tax Ratios-----			-----Tax Rates-----		
	2018 Actual	2019 Start Ratio	Change %	2018 Actual	2019 Revenue Neutral (Notional)	Change %
<i>Taxable</i>						
Residential	1.000000	1.000000	0.00%	0.00454208	0.00436154	-3.97%
Farm	0.250000	0.250000	0.00%	0.00113552	0.00109039	-3.97%
Managed Forest	0.250000	0.250000	0.00%	0.00113552	0.00109039	-3.97%
New Multi-Residential	1.000000	1.000000	0.00%	0.00454208	0.00436154	-3.97%
Multi-Residential	1.970000	1.970000	0.00%	0.00894790	0.00859223	-3.97%
Commercial	1.734900	1.734900	0.00%	0.00788005	0.00756684	-3.97%
Industrial	2.630000	2.630000	0.00%	0.01194567	0.01147085	-3.97%
Landfill	2.940261	2.940261	0.00%	0.01335490	0.01282407	-3.97%
Pipeline	1.702100	1.702100	0.00%	0.00773107	0.00742378	-3.97%
Sub-Total of Taxable Levy				\$59,439,133	\$59,439,137	0.00%
<i>Payment In Lieu</i>						
Residential	1.000000	1.000000	0.00%	0.00454208	0.00436154	-3.97%
Commercial	1.734900	1.734900	0.00%	0.00788005	0.00756684	-3.97%
Industrial	2.630000	2.630000	0.00%	0.01194567	0.01147085	-3.97%
Sub-Total of Payment In Lieu Levy				\$3,174,522	\$3,102,678	-2.26%
Total Taxable + PIL Levies Based on Rate Set				\$62,613,655	\$62,541,815	-0.11%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Niagara Falls</i>		Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$36,350,268	\$36,296,118	-\$54,150	-0.15%	
Farm	\$80,977	\$86,807	\$5,830	7.20%	
Managed Forest	\$1,257	\$1,304	\$47	3.74%	
New Multi-Residential	\$44,407	\$45,038	\$631	1.42%	
Multi-Residential	\$2,607,012	\$2,621,487	\$14,475	0.56%	
Commercial	\$18,550,222	\$18,578,140	\$27,918	0.15%	
Industrial	\$1,434,171	\$1,446,658	\$12,487	0.87%	
Landfill	\$42,101	\$40,428	-\$1,673	-3.97%	
Pipeline	\$328,718	\$323,157	-\$5,561	-1.69%	
Sub-Total: Taxable	\$59,439,133	\$59,439,137	\$4	0.00%	
<i>Payment In Lieu</i>					
Residential	\$28,875	\$31,917	\$3,042	10.54%	
Commercial	\$3,106,110	\$3,027,528	-\$78,582	-2.53%	
Industrial	\$39,537	\$43,233	\$3,696	9.35%	
Sub-Total: Payment In Lieu	\$3,174,522	\$3,102,678	-\$71,844	-2.26%	
Total (Taxable + PIL)	\$62,613,655	\$62,541,815	-\$71,840	-0.11%	

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Niagara Falls</i>		Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$45,383,334	\$45,413,796	\$30,462	0.07%	
Farm	\$101,100	\$108,612	\$7,512	7.43%	
Managed Forest	\$1,569	\$1,632	\$63	4.02%	
New Multi-Residential	\$55,442	\$56,352	\$910	1.64%	
Multi-Residential	\$3,254,856	\$3,280,011	\$25,155	0.77%	
Commercial	\$23,159,969	\$23,244,997	\$85,028	0.37%	
Industrial	\$1,790,562	\$1,810,063	\$19,501	1.09%	
Landfill	\$52,564	\$50,583	-\$1,981	-3.77%	
Pipeline	\$410,405	\$404,335	-\$6,070	-1.48%	
Sub-Total: Taxable	\$74,209,801	\$74,370,381	\$160,580	0.22%	
<i>Payment In Lieu</i>					
Residential	\$36,049	\$39,934	\$3,885	10.78%	
Commercial	\$3,877,981	\$3,788,046	-\$89,935	-2.32%	
Industrial	\$49,363	\$54,093	\$4,730	9.58%	
Sub-Total: Payment In Lieu	\$3,963,393	\$3,882,073	-\$81,320	-2.05%	
Total (Taxable + PIL)	\$78,173,194	\$78,252,454	\$79,260	0.10%	

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Niagara Falls</i>		Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$81,733,602	\$81,709,914	-\$23,688	-0.03%	
Farm	\$182,077	\$195,419	\$13,342	7.33%	
Managed Forest	\$2,826	\$2,936	\$110	3.89%	
New Multi-Residential	\$99,849	\$101,390	\$1,541	1.54%	
Multi-Residential	\$5,861,868	\$5,901,498	\$39,630	0.68%	
Commercial	\$41,710,191	\$41,823,137	\$112,946	0.27%	
Industrial	\$3,224,733	\$3,256,721	\$31,988	0.99%	
Landfill	\$94,665	\$91,011	-\$3,654	-3.86%	
Pipeline	\$739,123	\$727,492	-\$11,631	-1.57%	
Sub-Total: Taxable	\$133,648,934	\$133,809,518	\$160,584	0.12%	
<i>Payment In Lieu</i>					
Residential	\$64,924	\$71,851	\$6,927	10.67%	
Commercial	\$6,984,091	\$6,815,574	-\$168,517	-2.41%	
Industrial	\$88,900	\$97,326	\$8,426	9.48%	
Sub-Total: Payment In Lieu	\$7,137,915	\$6,984,751	-\$153,164	-2.15%	
Total (Taxable + PIL)	\$140,786,849	\$140,794,269	\$7,420	0.01%	

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Niagara-on-the-Lake</i>	2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	4,023,147,349	4,115,522,067	92,374,718	2.30%
Farm	545,818,225	544,672,725	-1,145,500	-0.21%
Managed Forest	1,048,000	1,392,300	344,300	32.85%
Multi-Residential	17,351,100	14,834,100	-2,517,000	-14.51%
Commercial	783,587,909	803,040,009	19,452,100	2.48%
Industrial	50,674,300	48,768,900	-1,905,400	-3.76%
Pipeline	18,402,000	18,492,000	90,000	0.49%
Sub-Total: Taxable	5,440,028,883	5,546,722,101	106,693,218	1.96%
<i>Payment In Lieu</i>				
Residential	3,552,600	3,687,600	135,000	3.80%
Commercial	38,965,000	38,965,000	0	0.00%
Industrial	2,011,000	2,011,000	0	0.00%
Sub-Total: Payment In Lieu	44,528,600	44,663,600	135,000	0.30%
Total (Taxable + PIL)	5,484,557,483	5,591,385,701	106,828,218	1.95%

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>Niagara-on-the-Lake</i>				
Realty Tax Class	2017 Full CVA Growth		2018 Full CVA Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	134,043,429	3.45%	92,374,718	2.30%
Farm	-8,828,875	-1.59%	-1,145,500	-0.21%
Managed Forest	8,500	0.82%	344,300	32.85%
Multi-Residential	183,000	1.07%	-2,517,000	-14.51%
Commercial	1,033,900	0.13%	19,452,100	2.48%
Industrial	-820,700	-1.59%	-1,905,400	-3.76%
Pipeline	116,000	0.63%	90,000	0.49%
Sub-Total: Taxable	125,735,254	2.37%	106,693,218	1.96%
<i>Payment In Lieu</i>				
Residential	-531,000	-13.00%	135,000	3.80%
Commercial	78,000	0.20%	0	0.00%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	-453,000	-1.01%	135,000	0.30%
Total (Taxable + PIL)	125,282,254	2.34%	106,828,218	1.95%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>Niagara-on-the-Lake</i>		2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	3,719,402,387	3,807,248,706	87,846,319	2.36%	
Farm	445,463,201	444,360,219	-1,102,982	-0.25%	
Managed Forest	797,000	1,071,889	274,889	34.49%	
Multi-Residential	16,526,990	14,107,550	-2,419,440	-14.64%	
Commercial	698,572,754	714,904,257	16,331,503	2.34%	
Industrial	44,092,981	42,721,844	-1,371,137	-3.11%	
Pipeline	17,390,000	17,475,757	85,757	0.49%	
Sub-Total: Taxable	4,942,245,313	5,041,890,222	99,644,909	2.02%	
<i>Payment In Lieu</i>					
Residential	3,194,400	3,294,960	100,560	3.15%	
Commercial	34,893,012	34,893,012	0	0.00%	
Industrial	1,605,000	1,605,000	0	0.00%	
Sub-Total: Payment In Lieu	39,692,412	39,792,972	100,560	0.25%	
Total (Taxable + PIL)	4,981,937,725	5,081,683,194	99,745,469	2.00%	

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Niagara-on-the-Lake</i>		2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	\$7,736,209	\$7,918,926	\$182,717	2.36%	
Farm	\$231,637	\$231,063	-\$573	-0.25%	
Managed Forest	\$414	\$557	\$143	34.54%	
Multi-Residential	\$67,720	\$57,806	-\$9,914	-14.64%	
Commercial	\$2,491,440	\$2,551,973	\$60,535	2.43%	
Industrial	\$217,109	\$211,574	-\$5,536	-2.55%	
Pipeline	\$61,566	\$61,869	\$304	0.49%	
Sub-Total: Taxable	\$10,806,095	\$11,033,768	\$227,676	2.11%	
<i>Payment In Lieu</i>					
Residential	\$6,645	\$6,854	\$209	3.15%	
Commercial	\$122,765	\$122,765	\$0	0.00%	
Industrial	\$6,355	\$6,355	\$0	0.00%	
Sub-Total: Payment In Lieu	\$135,765	\$135,974	\$209	0.15%	
Total (Taxable + PIL)	\$10,941,860	\$11,169,742	\$227,885	2.08%	

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Niagara-on-the-Lake</i>		2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
Realty Tax Class		\$	%	\$	%
<i>Taxable</i>					
Residential		\$262,345	3.62%	\$182,717	2.36%
Farm		-\$3,140	-1.49%	-\$573	-0.25%
Managed Forest		\$3	0.86%	\$143	34.54%
Multi-Residential		\$702	1.05%	-\$9,914	-14.64%
Commercial		\$12,552	0.53%	\$60,535	2.43%
Industrial		-\$1,598	-0.78%	-\$5,536	-2.55%
Pipeline		\$380	0.63%	\$304	0.49%
Sub-Total: Taxable		\$271,244	2.67%	\$227,676	2.11%
<i>Payment In Lieu</i>					
Residential		-\$1,065	-14.38%	\$209	3.15%
Commercial		\$289	0.24%	\$0	0.00%
Industrial		\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu		-\$776	-0.59%	\$209	0.15%
Total (Taxable + PIL)		\$270,468	2.63%	\$227,885	2.08%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Niagara-on-the-Lake</i>	Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	3,807,248,706	3,961,385,384	154,136,678	4.05%
Farm	444,360,219	494,516,457	50,156,238	11.29%
Managed Forest	1,071,889	1,232,094	160,205	14.95%
Multi-Residential	14,107,550	14,470,825	363,275	2.58%
Commercial	714,904,257	758,972,139	44,067,882	6.16%
Industrial	42,721,844	45,745,372	3,023,528	7.08%
Pipeline	17,475,757	17,983,879	508,122	2.91%
Sub-Total: Taxable	5,041,890,222	5,294,306,150	252,415,928	5.01%
<i>Payment In Lieu</i>				
Residential	3,294,960	3,491,280	196,320	5.96%
Commercial	34,893,012	36,929,006	2,035,994	5.83%
Industrial	1,605,000	1,808,000	203,000	12.65%
Sub-Total: Payment In Lieu	39,792,972	42,228,286	2,435,314	6.12%
Total (Taxable + PIL)	5,081,683,194	5,336,534,436	254,851,242	5.02%

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

-----Tax Ratios-----		-----Tax Rates-----				
Realty Tax Class	2018 Actual	2019 Start Ratio	Change %	2018 Actual	2019 Revenue Netural (Notional)	Change %
Taxable						
Residential	1.000000	1.000000	0.00%	0.00207996	0.00198637	-4.50%
Farm	0.250000	0.250000	0.00%	0.00051999	0.00049659	-4.50%
Managed Forest	0.250000	0.250000	0.00%	0.00051999	0.00049659	-4.50%
Multi-Residential	1.970000	1.970000	0.00%	0.00409752	0.00391315	-4.50%
Commercial	1.734900	1.734900	0.00%	0.00360852	0.00344615	-4.50%
Industrial	2.630000	2.630000	0.00%	0.00547029	0.00522415	-4.50%
Pipeline	1.702100	1.702100	0.00%	0.00354030	0.00338100	-4.50%
Sub-Total of Taxable Levy				\$11,033,768	\$11,033,788	0.00%
Payment In Lieu						
Residential	1.000000	1.000000	0.00%	0.00207996	0.00198637	-4.50%
Commercial	1.734900	1.734900	0.00%	0.00360852	0.00344615	-4.50%
Industrial	2.630000	2.630000	0.00%	0.00547029	0.00522415	-4.50%
Sub-Total of Payment In Lieu Levy				\$135,974	\$137,761	1.31%
Total Taxable + PIL Levies Based on Rate Set				\$11,169,742	\$11,171,549	0.02%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Niagara-on-the-Lake</i>		Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$7,918,926	\$7,868,777	-\$50,149	-0.63%	
Farm	\$231,063	\$245,572	\$14,509	6.28%	
Managed Forest	\$557	\$612	\$55	9.87%	
Multi-Residential	\$57,806	\$56,627	-\$1,179	-2.04%	
Commercial	\$2,551,973	\$2,586,262	\$34,289	1.34%	
Industrial	\$211,574	\$215,135	\$3,561	1.68%	
Pipeline	\$61,869	\$60,803	-\$1,066	-1.72%	
Sub-Total: Taxable	\$11,033,768	\$11,033,788	\$20	0.00%	
<i>Payment In Lieu</i>					
Residential	\$6,854	\$6,935	\$81	1.18%	
Commercial	\$122,765	\$123,990	\$1,225	1.00%	
Industrial	\$6,355	\$6,836	\$481	7.57%	
Sub-Total: Payment In Lieu	\$135,974	\$137,761	\$1,787	1.31%	
Total (Taxable + PIL)	\$11,169,742	\$11,171,549	\$1,807	0.02%	

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Niagara-on-the-Lake</i>		Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$21,590,108	\$21,617,953	\$27,845	0.13%	
Farm	\$629,970	\$674,664	\$44,694	7.09%	
Managed Forest	\$1,520	\$1,681	\$161	10.59%	
Multi-Residential	\$157,602	\$155,570	-\$2,032	-1.29%	
Commercial	\$6,957,686	\$7,105,261	\$147,575	2.12%	
Industrial	\$576,833	\$591,042	\$14,209	2.46%	
Pipeline	\$168,680	\$167,046	-\$1,634	-0.97%	
Sub-Total: Taxable	\$30,082,399	\$30,313,217	\$230,818	0.77%	
<i>Payment In Lieu</i>					
Residential	\$18,684	\$19,053	\$369	1.97%	
Commercial	\$334,709	\$340,641	\$5,932	1.77%	
Industrial	\$17,324	\$18,780	\$1,456	8.40%	
Sub-Total: Payment In Lieu	\$370,717	\$378,474	\$7,757	2.09%	
Total (Taxable + PIL)	\$30,453,116	\$30,691,691	\$238,575	0.78%	

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Niagara-on-the-Lake</i>		Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$29,509,034	\$29,486,730	-\$22,304	-0.08%	
Farm	\$861,033	\$920,236	\$59,203	6.88%	
Managed Forest	\$2,077	\$2,293	\$216	10.40%	
Multi-Residential	\$215,408	\$212,197	-\$3,211	-1.49%	
Commercial	\$9,509,659	\$9,691,523	\$181,864	1.91%	
Industrial	\$788,407	\$806,177	\$17,770	2.25%	
Pipeline	\$230,549	\$227,849	-\$2,700	-1.17%	
Sub-Total: Taxable	\$41,116,167	\$41,347,005	\$230,838	0.56%	
<i>Payment In Lieu</i>					
Residential	\$25,538	\$25,988	\$450	1.76%	
Commercial	\$457,474	\$464,631	\$7,157	1.56%	
Industrial	\$23,679	\$25,616	\$1,937	8.18%	
Sub-Total: Payment In Lieu	\$506,691	\$516,235	\$9,544	1.88%	
Total (Taxable + PIL)	\$41,622,858	\$41,863,240	\$240,382	0.58%	

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Pelham</i>	2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	2,429,599,737	2,480,194,170	50,594,433	2.08%
Farm	170,646,633	170,829,633	183,000	0.11%
Managed Forest	2,236,700	2,871,500	634,800	28.38%
New Multi-Residential	0	544,000	544,000	100.00%
Multi-Residential	17,693,000	17,693,000	0	0.00%
Commercial	91,534,600	94,616,397	3,081,797	3.37%
Industrial	3,541,930	3,294,700	-247,230	-6.98%
Pipeline	17,146,000	17,324,000	178,000	1.04%
Sub-Total: Taxable	2,732,398,600	2,787,367,400	54,968,800	2.01%
<i>Payment In Lieu</i>				
Residential	3,000	3,000	0	0.00%
Commercial	2,954,600	2,954,600	0	0.00%
Industrial	28,100	28,100	0	0.00%
Sub-Total: Payment In Lieu	2,985,700	2,985,700	0	0.00%
Total (Taxable + PIL)	2,735,384,300	2,790,353,100	54,968,800	2.01%

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>Pelham</i>	2017 Full CVA Growth		2018 Full CVA Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	68,646,902	2.91%	50,594,433	2.08%
Farm	-3,913,467	-2.24%	183,000	0.11%
Managed Forest	65,500	3.02%	634,800	28.38%
New Multi-Residential			544,000	100.00%
Multi-Residential	0	0.00%	0	0.00%
Commercial	9,384,359	11.42%	3,081,797	3.37%
Industrial	-1,637,570	-31.62%	-247,230	-6.98%
Pipeline	356,000	2.12%	178,000	1.04%
Sub-Total: Taxable	72,901,724	2.74%	54,968,800	2.01%
<i>Payment In Lieu</i>				
Residential	0	0.00%	0	0.00%
Commercial	-461,000	-13.50%	0	0.00%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	-461,000	-13.38%	0	0.00%
Total (Taxable + PIL)	72,440,724	2.72%	54,968,800	2.01%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>Pelham</i>		2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	2,291,395,631	2,339,018,348	47,622,717	2.08%	
Farm	143,204,190	143,189,756	-14,434	-0.01%	
Managed Forest	1,961,922	2,531,083	569,161	29.01%	
New Multi-Residential	0	544,000	544,000	100.00%	
Multi-Residential	17,482,000	17,482,000	0	0.00%	
Commercial	84,021,436	86,971,992	2,950,556	3.51%	
Industrial	3,038,822	2,908,852	-129,970	-4.28%	
Pipeline	16,213,500	16,384,186	170,686	1.05%	
Sub-Total: Taxable	2,557,317,501	2,609,030,217	51,712,716	2.02%	
<i>Payment In Lieu</i>					
Residential	2,500	2,500	0	0.00%	
Commercial	2,888,100	2,888,100	0	0.00%	
Industrial	23,100	23,100	0	0.00%	
Sub-Total: Payment In Lieu	2,913,700	2,913,700	0	0.00%	
Total (Taxable + PIL)	2,560,231,201	2,611,943,917	51,712,716	2.02%	

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Pelham</i>	2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	\$11,296,398	\$11,531,174	\$234,776	2.08%
Farm	\$176,496	\$176,479	-\$18	-0.01%
Managed Forest	\$2,418	\$3,120	\$701	28.99%
New Multi-Residential	\$0	\$2,682	\$2,682	100.00%
Multi-Residential	\$169,784	\$169,784	\$0	0.00%
Commercial	\$710,546	\$737,228	\$26,684	3.76%
Industrial	\$38,935	\$37,250	-\$1,685	-4.33%
Pipeline	\$136,051	\$137,483	\$1,432	1.05%
Sub-Total: Taxable	\$12,530,628	\$12,795,200	\$264,572	2.11%
<i>Payment In Lieu</i>				
Residential	\$12	\$12	\$0	0.00%
Commercial	\$24,702	\$24,702	\$0	0.00%
Industrial	\$300	\$300	\$0	0.00%
Sub-Total: Payment In Lieu	\$25,014	\$25,014	\$0	0.00%
Total (Taxable + PIL)	\$12,555,642	\$12,820,214	\$264,572	2.11%

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Pelham</i>	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	\$310,855	2.92%	\$234,776	2.08%
Farm	-\$2,683	-1.65%	-\$18	-0.01%
Managed Forest	\$61	2.79%	\$701	28.99%
New Multi-Residential			\$2,682	100.00%
Multi-Residential	\$0	0.00%	\$0	0.00%
Commercial	\$60,940	9.70%	\$26,684	3.76%
Industrial	-\$14,711	-29.16%	-\$1,685	-4.33%
Pipeline	\$2,736	2.11%	\$1,432	1.05%
Sub-Total: Taxable	\$357,198	3.03%	\$264,572	2.11%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	\$0	0.00%
Commercial	-\$3,117	-11.18%	\$0	0.00%
Industrial	\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu	-\$3,117	-11.07%	\$0	0.00%
Total (Taxable + PIL)	\$354,081	3.00%	\$264,572	2.11%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Pelham</i>	Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	2,339,018,348	2,409,606,273	70,587,925	3.02%
Farm	143,189,756	157,009,692	13,819,936	9.65%
Managed Forest	2,531,083	2,701,293	170,210	6.72%
New Multi-Residential	544,000	544,000	0	0.00%
Multi-Residential	17,482,000	17,587,500	105,500	0.60%
Commercial	86,971,992	90,794,195	3,822,203	4.39%
Industrial	2,908,852	3,101,776	192,924	6.63%
Pipeline	16,384,186	16,854,093	469,907	2.87%
Sub-Total: Taxable	2,609,030,217	2,698,198,822	89,168,605	3.42%
<i>Payment In Lieu</i>				
Residential	2,500	2,750	250	10.00%
Commercial	2,888,100	2,921,350	33,250	1.15%
Industrial	23,100	25,600	2,500	10.82%
Sub-Total: Payment In Lieu	2,913,700	2,949,700	36,000	1.24%
Total (Taxable + PIL)	2,611,943,917	2,701,148,522	89,204,605	3.42%

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>Pelham</i> Realty Tax Class	-----Tax Ratios-----			-----Tax Rates-----		
	2018 Actual	2019 Start Ratio	Change %	2018 Actual	2019 Revenue Neutral (Notional)	Change %
<i>Taxable</i>						
Residential	1.000000	1.000000	0.00%	0.00492992	0.00477890	-3.06%
Farm	0.250000	0.250000	0.00%	0.00123248	0.00119473	-3.06%
Managed Forest	0.250000	0.250000	0.00%	0.00123248	0.00119473	-3.06%
New Multi-Residential	1.000000	1.000000	0.00%	0.00492992	0.00477890	-3.06%
Multi-Residential	1.970000	1.970000	0.00%	0.00971194	0.00941443	-3.06%
Commercial	1.734900	1.734900	0.00%	0.00855292	0.00829091	-3.06%
Industrial	2.630000	2.630000	0.00%	0.01296569	0.01256851	-3.06%
Pipeline	1.702100	1.702100	0.00%	0.00839122	0.00813417	-3.06%
Sub-Total of Taxable Levy				\$12,795,200	\$12,795,210	0.00%
<i>Payment In Lieu</i>						
Residential	1.000000	1.000000	0.00%	0.00492992	0.00477890	-3.06%
Commercial	1.734900	1.734900	0.00%	0.00855292	0.00829091	-3.06%
Industrial	2.630000	2.630000	0.00%	0.01296569	0.01256851	-3.06%
Sub-Total of Payment In Lieu Levy				\$25,014	\$24,556	-1.83%
Total Taxable + PIL Levies Based on Rate Set				\$12,820,214	\$12,819,766	0.00%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.



Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Pelham</i>		Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$11,531,174	\$11,515,267	-\$15,907	-0.14%	
Farm	\$176,479	\$187,584	\$11,105	6.29%	
Managed Forest	\$3,120	\$3,227	\$107	3.43%	
New Multi-Residential	\$2,682	\$2,600	-\$82	-3.06%	
Multi-Residential	\$169,784	\$165,576	-\$4,208	-2.48%	
Commercial	\$737,228	\$745,378	\$8,150	1.11%	
Industrial	\$37,250	\$38,484	\$1,234	3.31%	
Pipeline	\$137,483	\$137,094	-\$389	-0.28%	
Sub-Total: Taxable	\$12,795,200	\$12,795,210	\$10	0.00%	
<i>Payment In Lieu</i>					
Residential	\$12	\$13	\$1	8.33%	
Commercial	\$24,702	\$24,221	-\$481	-1.95%	
Industrial	\$300	\$322	\$22	7.33%	
Sub-Total: Payment In Lieu	\$25,014	\$24,556	-\$458	-1.83%	
Total (Taxable + PIL)	\$12,820,214	\$12,819,766	-\$448	0.00%	

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Pelham</i>		Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$13,264,082	\$13,149,631	-\$114,451	-0.86%	
Farm	\$203,000	\$214,207	\$11,207	5.52%	
Managed Forest	\$3,588	\$3,685	\$97	2.70%	
New Multi-Residential	\$3,085	\$2,969	-\$116	-3.76%	
Multi-Residential	\$195,299	\$189,077	-\$6,222	-3.19%	
Commercial	\$848,018	\$851,170	\$3,152	0.37%	
Industrial	\$42,848	\$43,945	\$1,097	2.56%	
Pipeline	\$158,144	\$156,552	-\$1,592	-1.01%	
Sub-Total: Taxable	\$14,718,064	\$14,611,236	-\$106,828	-0.73%	
<i>Payment In Lieu</i>					
Residential	\$14	\$15	\$1	7.14%	
Commercial	\$28,414	\$27,658	-\$756	-2.66%	
Industrial	\$345	\$367	\$22	6.38%	
Sub-Total: Payment In Lieu	\$28,773	\$28,040	-\$733	-2.55%	
Total (Taxable + PIL)	\$14,746,837	\$14,639,276	-\$107,561	-0.73%	

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Pelham</i>	Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$24,795,256	\$24,664,898	-\$130,358	-0.53%
Farm	\$379,479	\$401,791	\$22,312	5.88%
Managed Forest	\$6,708	\$6,912	\$204	3.04%
New Multi-Residential	\$5,767	\$5,569	-\$198	-3.43%
Multi-Residential	\$365,083	\$354,653	-\$10,430	-2.86%
Commercial	\$1,585,246	\$1,596,548	\$11,302	0.71%
Industrial	\$80,098	\$82,429	\$2,331	2.91%
Pipeline	\$295,627	\$293,646	-\$1,981	-0.67%
Sub-Total: Taxable	\$27,513,264	\$27,406,446	-\$106,818	-0.39%
<i>Payment In Lieu</i>				
Residential	\$26	\$28	\$2	7.69%
Commercial	\$53,116	\$51,879	-\$1,237	-2.33%
Industrial	\$645	\$689	\$44	6.82%
Sub-Total: Payment In Lieu	\$53,787	\$52,596	-\$1,191	-2.21%
Total (Taxable + PIL)	\$27,567,051	\$27,459,042	-\$108,009	-0.39%

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Port Colborne</i>		2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	1,592,946,136	1,607,142,914	14,196,778	0.89%	
Farm	56,827,000	56,739,600	-87,400	-0.15%	
Managed Forest	882,700	882,700	0	0.00%	
New Multi-Residential	600,000	600,000	0	0.00%	
Multi-Residential	38,878,000	38,878,000	0	0.00%	
Commercial	136,216,700	139,770,654	3,553,954	2.61%	
Industrial	85,488,500	81,511,968	-3,976,532	-4.65%	
Pipeline	10,512,000	10,484,000	-28,000	-0.27%	
Sub-Total: Taxable	1,922,351,036	1,936,009,836	13,658,800	0.71%	
<i>Payment In Lieu</i>					
Residential	1,491,400	1,491,400	0	0.00%	
Commercial	10,470,800	11,917,800	1,447,000	13.82%	
Industrial	78,000	78,000	0	0.00%	
Sub-Total: Payment In Lieu	12,040,200	13,487,200	1,447,000	12.02%	
Total (Taxable + PIL)	1,934,391,236	1,949,497,036	15,105,800	0.78%	

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

Port Colborne

Realty Tax Class	2017 Full CVA Growth		2018 Full CVA Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	9,161,500	0.58%	14,196,778	0.89%
Farm	-639,800	-1.11%	-87,400	-0.15%
Managed Forest	-195,000	-18.09%	0	0.00%
New Multi-Residential	600,000	100.00%	0	0.00%
Multi-Residential	-242,000	-0.62%	0	0.00%
Commercial	-562,200	-0.41%	3,553,954	2.61%
Industrial	2,417,700	2.91%	-3,976,532	-4.65%
Pipeline	22,000	0.21%	-28,000	-0.27%
Sub-Total: Taxable	10,562,200	0.55%	13,658,800	0.71%
<i>Payment In Lieu</i>				
Residential	0	0.00%	0	0.00%
Commercial	25,000	0.24%	1,447,000	13.82%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	25,000	0.21%	1,447,000	12.02%
Total (Taxable + PIL)	10,587,200	0.55%	15,105,800	0.78%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>Port Colborne</i>		2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	1,514,141,526	1,527,066,995	12,925,469	0.85%	
Farm	50,878,746	50,796,146	-82,600	-0.16%	
Managed Forest	832,709	832,709	0	0.00%	
New Multi-Residential	600,000	600,000	0	0.00%	
Multi-Residential	38,593,250	38,593,250	0	0.00%	
Commercial	123,510,984	126,841,407	3,330,423	2.70%	
Industrial	78,030,884	76,081,016	-1,949,868	-2.50%	
Pipeline	9,991,268	9,964,591	-26,677	-0.27%	
Sub-Total: Taxable	1,816,579,367	1,830,776,114	14,196,747	0.78%	
<i>Payment In Lieu</i>					
Residential	1,102,300	1,102,300	0	0.00%	
Commercial	9,872,500	11,312,923	1,440,423	14.59%	
Industrial	75,650	75,650	0	0.00%	
Sub-Total: Payment In Lieu	11,050,450	12,490,873	1,440,423	13.03%	
Total (Taxable + PIL)	1,827,629,817	1,843,266,987	15,637,170	0.86%	

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Port Colborne</i>		2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	\$12,762,940	\$12,871,903	\$108,964	0.85%	
Farm	\$107,240	\$107,066	-\$174	-0.16%	
Managed Forest	\$1,755	\$1,755	\$0	0.00%	
New Multi-Residential	\$5,059	\$5,059	\$0	0.00%	
Multi-Residential	\$641,000	\$641,000	\$0	0.00%	
Commercial	\$1,795,173	\$1,844,392	\$49,219	2.74%	
Industrial	\$1,659,856	\$1,630,743	-\$29,114	-1.75%	
Pipeline	\$143,379	\$142,996	-\$383	-0.27%	
Sub-Total: Taxable	\$17,116,402	\$17,244,914	\$128,512	0.75%	
<i>Payment In Lieu</i>					
Residential	\$9,293	\$9,293	\$0	0.00%	
Commercial	\$144,405	\$165,475	\$21,069	14.59%	
Industrial	\$1,677	\$1,677	\$0	0.00%	
Sub-Total: Payment In Lieu	\$155,375	\$176,445	\$21,069	13.56%	
Total (Taxable + PIL)	\$17,271,777	\$17,421,359	\$149,581	0.87%	

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Port Colborne</i>				
Realty Tax Class	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	\$81,370	0.68%	\$108,964	0.85%
Farm	-\$1,184	-1.19%	-\$174	-0.16%
Managed Forest	-\$347	-17.35%	\$0	0.00%
New Multi-Residential	\$4,910	100.00%	\$0	0.00%
Multi-Residential	-\$2,979	-0.47%	\$0	0.00%
Commercial	-\$2,755	-0.16%	\$49,219	2.74%
Industrial	\$36,746	2.44%	-\$29,114	-1.75%
Pipeline	\$20	0.01%	-\$383	-0.27%
Sub-Total: Taxable	\$115,781	0.72%	\$128,512	0.75%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	\$0	0.00%
Commercial	\$349	0.25%	\$21,069	14.59%
Industrial	\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu	\$349	0.24%	\$21,069	13.56%
Total (Taxable + PIL)	\$116,130	0.72%	\$149,581	0.87%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Port Colborne</i>	Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	1,527,066,995	1,567,104,955	40,037,960	2.62%
Farm	50,796,146	53,767,874	2,971,728	5.85%
Managed Forest	832,709	857,705	24,996	3.00%
New Multi-Residential	600,000	600,000	0	0.00%
Multi-Residential	38,593,250	38,735,625	142,375	0.37%
Commercial	126,841,407	133,306,029	6,464,622	5.10%
Industrial	76,081,016	78,796,493	2,715,477	3.57%
Pipeline	9,964,591	10,224,296	259,705	2.61%
Sub-Total: Taxable	1,830,776,114	1,883,392,977	52,616,863	2.87%
<i>Payment In Lieu</i>				
Residential	1,102,300	1,296,850	194,550	17.65%
Commercial	11,312,923	11,615,362	302,439	2.67%
Industrial	75,650	76,825	1,175	1.55%
Sub-Total: Payment In Lieu	12,490,873	12,989,037	498,164	3.99%
Total (Taxable + PIL)	1,843,266,987	1,896,382,014	53,115,027	2.88%

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>Port Colborne</i> Realty Tax Class	-----Tax Ratios-----		-----Tax Rates-----	
	2018 Actual	2019 Start Ratio	Change %	2018 Actual 2019 Revenue Netural (Notional)
<i>Taxable</i>				
Residential	1.000000	1.000000	0.00%	0.00843103 0.00819413 -2.81%
Farm	0.250000	0.250000	0.00%	0.00210776 0.00204853 -2.81%
Managed Forest	0.250000	0.250000	0.00%	0.00210776 0.00204853 -2.81%
New Multi-Residential	1.000000	1.000000	0.00%	0.00843103 0.00819413 -2.81%
Multi-Residential	1.970000	1.970000	0.00%	0.01660912 0.01614244 -2.81%
Commercial	1.734900	1.734900	0.00%	0.01462699 0.01421600 -2.81%
Industrial	2.630000	2.630000	0.00%	0.02217360 0.02155056 -2.81%
Pipeline	1.702100	1.702100	0.00%	0.01435045 0.01394723 -2.81%
Sub-Total of Taxable Levy				\$17,244,914 \$17,244,910 0.00%
<i>Payment In Lieu</i>				
Residential	1.000000	1.000000	0.00%	0.00843103 0.00819413 -2.81%
Commercial	1.734900	1.734900	0.00%	0.01462699 0.01421600 -2.81%
Industrial	2.630000	2.630000	0.00%	0.02217360 0.02155056 -2.81%
Sub-Total of Payment In Lieu Levy				\$176,445 \$177,406 0.54%
Total Taxable + PIL Levies Based on Rate Set				\$17,421,359 \$17,422,316 0.01%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.



Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Port Colborne</i>		Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$12,871,903	\$12,838,234	-\$33,669	-0.26%	
Farm	\$107,066	\$110,145	\$3,079	2.88%	
Managed Forest	\$1,755	\$1,757	\$2	0.11%	
New Multi-Residential	\$5,059	\$4,916	-\$143	-2.83%	
Multi-Residential	\$641,000	\$625,288	-\$15,712	-2.45%	
Commercial	\$1,844,392	\$1,884,119	\$39,727	2.15%	
Industrial	\$1,630,743	\$1,637,850	\$7,107	0.44%	
Pipeline	\$142,996	\$142,601	-\$395	-0.28%	
Sub-Total: Taxable	\$17,244,914	\$17,244,910	-\$4	0.00%	
<i>Payment In Lieu</i>					
Residential	\$9,293	\$10,626	\$1,333	14.34%	
Commercial	\$165,475	\$165,124	-\$351	-0.21%	
Industrial	\$1,677	\$1,656	-\$21	-1.25%	
Sub-Total: Payment In Lieu	\$176,445	\$177,406	\$961	0.54%	
Total (Taxable + PIL)	\$17,421,359	\$17,422,316	\$957	0.01%	

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Port Colborne</i>		Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$8,657,763	\$8,550,075	-\$107,688	-1.24%	
Farm	\$72,014	\$73,355	\$1,341	1.86%	
Managed Forest	\$1,181	\$1,170	-\$11	-0.93%	
New Multi-Residential	\$3,402	\$3,274	-\$128	-3.76%	
Multi-Residential	\$431,143	\$416,432	-\$14,711	-3.41%	
Commercial	\$1,240,555	\$1,254,795	\$14,240	1.15%	
Industrial	\$1,096,853	\$1,090,786	-\$6,067	-0.55%	
Pipeline	\$96,181	\$94,970	-\$1,211	-1.26%	
Sub-Total: Taxable	\$11,599,092	\$11,484,857	-\$114,235	-0.98%	
<i>Payment In Lieu</i>					
Residential	\$6,251	\$7,078	\$827	13.23%	
Commercial	\$111,299	\$109,970	-\$1,329	-1.19%	
Industrial	\$1,128	\$1,103	-\$25	-2.22%	
Sub-Total: Payment In Lieu	\$118,678	\$118,151	-\$527	-0.44%	
Total (Taxable + PIL)	\$11,717,770	\$11,603,008	-\$114,762	-0.98%	

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Port Colborne</i>		Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$21,529,666	\$21,388,309	-\$141,357	-0.66%	
Farm	\$179,080	\$183,500	\$4,420	2.47%	
Managed Forest	\$2,936	\$2,927	-\$9	-0.31%	
New Multi-Residential	\$8,461	\$8,190	-\$271	-3.20%	
Multi-Residential	\$1,072,143	\$1,041,720	-\$30,423	-2.84%	
Commercial	\$3,084,947	\$3,138,914	\$53,967	1.75%	
Industrial	\$2,727,596	\$2,728,636	\$1,040	0.04%	
Pipeline	\$239,177	\$237,571	-\$1,606	-0.67%	
Sub-Total: Taxable	\$28,844,006	\$28,729,767	-\$114,239	-0.40%	
<i>Payment In Lieu</i>					
Residential	\$15,544	\$17,704	\$2,160	13.90%	
Commercial	\$276,774	\$275,094	-\$1,680	-0.61%	
Industrial	\$2,805	\$2,759	-\$46	-1.64%	
Sub-Total: Payment In Lieu	\$295,123	\$295,557	\$434	0.15%	
Total (Taxable + PIL)	\$29,139,129	\$29,025,324	-\$113,805	-0.39%	

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>St. Catharines</i>	2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	12,013,898,248	12,159,948,664	146,050,416	1.22%
Farm	141,783,700	140,178,200	-1,605,500	-1.13%
New Multi-Residential	60,879,500	62,266,242	1,386,742	2.28%
Multi-Residential	730,548,400	697,136,240	-33,412,160	-4.57%
Commercial	2,074,924,805	2,084,678,616	9,753,811	0.47%
Industrial	206,825,600	189,966,400	-16,859,200	-8.15%
Pipeline	30,868,000	31,079,000	211,000	0.68%
Sub-Total: Taxable	15,259,728,253	15,365,253,362	105,525,109	0.69%
<i>Payment In Lieu</i>				
Residential	3,141,200	3,304,200	163,000	5.19%
Commercial	88,439,200	87,198,200	-1,241,000	-1.40%
Industrial	2,726,300	2,726,300	0	0.00%
Sub-Total: Payment In Lieu	94,306,700	93,228,700	-1,078,000	-1.14%
Total (Taxable + PIL)	15,354,034,953	15,458,482,062	104,447,109	0.68%

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

St. Catharines

Realty Tax Class	2017 Full CVA Growth		2018 Full CVA Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	57,692,103	0.48%	146,050,416	1.22%
Farm	-404,500	-0.28%	-1,605,500	-1.13%
New Multi-Residential	28,223,900	86.43%	1,386,742	2.28%
Multi-Residential	350,200	0.05%	-33,412,160	-4.57%
Commercial	10,504,205	0.51%	9,753,811	0.47%
Industrial	6,700	0.00%	-16,859,200	-8.15%
Pipeline	112,000	0.36%	211,000	0.68%
Sub-Total: Taxable	96,484,608	0.64%	105,525,109	0.69%
<i>Payment In Lieu</i>				
Residential	-24,000	-0.76%	163,000	5.19%
Commercial	-328,000	-0.37%	-1,241,000	-1.40%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	-352,000	-0.37%	-1,078,000	-1.14%
Total (Taxable + PIL)	96,132,608	0.63%	104,447,109	0.68%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>St. Catharines</i>		2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	11,314,778,782	11,453,055,159	138,276,377	1.22%	
Farm	116,556,433	115,213,486	-1,342,947	-1.15%	
New Multi-Residential	53,780,980	55,283,360	1,502,380	2.79%	
Multi-Residential	678,157,533	646,503,582	-31,653,951	-4.67%	
Commercial	1,867,087,017	1,875,070,050	7,983,033	0.43%	
Industrial	195,506,482	181,136,013	-14,370,469	-7.35%	
Pipeline	29,657,500	29,815,359	157,859	0.53%	
Sub-Total: Taxable	14,255,524,727	14,356,077,009	100,552,282	0.71%	
<i>Payment In Lieu</i>					
Residential	2,875,600	3,029,347	153,747	5.35%	
Commercial	83,254,565	82,005,894	-1,248,671	-1.50%	
Industrial	2,311,501	2,311,501	0	0.00%	
Sub-Total: Payment In Lieu	88,441,666	87,346,742	-1,094,924	-1.24%	
Total (Taxable + PIL)	14,343,966,393	14,443,423,751	99,457,358	0.69%	

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>St. Catharines</i>		2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	\$60,905,378	\$61,650,484	\$745,106	1.22%	
Farm	\$157,017	\$155,208	-\$1,809	-1.15%	
New Multi-Residential	\$289,800	\$297,896	\$8,096	2.79%	
Multi-Residential	\$7,198,913	\$6,862,894	-\$336,019	-4.67%	
Commercial	\$17,366,805	\$17,446,538	\$79,729	0.46%	
Industrial	\$2,641,892	\$2,447,152	-\$194,741	-7.37%	
Pipeline	\$272,013	\$273,461	\$1,448	0.53%	
Sub-Total: Taxable	\$88,831,818	\$89,133,633	\$301,810	0.34%	
<i>Payment In Lieu</i>					
Residential	\$15,495	\$16,324	\$828	5.34%	
Commercial	\$774,254	\$762,581	-\$11,673	-1.51%	
Industrial	\$30,362	\$30,362	\$0	0.00%	
Sub-Total: Payment In Lieu	\$820,111	\$809,267	-\$10,845	-1.32%	
Total (Taxable + PIL)	\$89,651,929	\$89,942,900	\$290,965	0.32%	

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>St. Catharines</i>				
Realty Tax Class	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	\$344,565	0.58%	\$745,106	1.22%
Farm	\$52	0.04%	-\$1,809	-1.15%
New Multi-Residential	\$120,540	78.64%	\$8,096	2.79%
Multi-Residential	\$24,979	0.35%	-\$336,019	-4.67%
Commercial	\$107,772	0.64%	\$79,729	0.46%
Industrial	\$1,592	0.06%	-\$194,741	-7.37%
Pipeline	\$970	0.36%	\$1,448	0.53%
Sub-Total: Taxable	\$600,470	0.70%	\$301,810	0.34%
<i>Payment In Lieu</i>				
Residential	-\$45	-0.30%	\$828	5.34%
Commercial	-\$3,181	-0.41%	-\$11,673	-1.51%
Industrial	\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu	-\$3,226	-0.40%	-\$10,845	-1.32%
Total (Taxable + PIL)	\$597,244	0.69%	\$290,965	0.32%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>St. Catharines</i>		Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%	
<i>Taxable</i>					
Residential	11,453,055,159	11,806,501,916	353,446,757	3.09%	
Farm	115,213,486	127,695,843	12,482,357	10.83%	
New Multi-Residential	55,283,360	58,774,801	3,491,441	6.32%	
Multi-Residential	646,503,582	671,819,914	25,316,332	3.92%	
Commercial	1,875,070,050	1,979,874,356	104,804,306	5.59%	
Industrial	181,136,013	185,551,208	4,415,195	2.44%	
Pipeline	29,815,359	30,447,179	631,820	2.12%	
Sub-Total: Taxable	14,356,077,009	14,860,665,217	504,588,208	3.51%	
<i>Payment In Lieu</i>					
Residential	3,029,347	3,166,774	137,427	4.54%	
Commercial	82,005,894	84,602,048	2,596,154	3.17%	
Industrial	2,311,501	2,518,900	207,399	8.97%	
Sub-Total: Payment In Lieu	87,346,742	90,287,722	2,940,980	3.37%	
Total (Taxable + PIL)	14,443,423,751	14,950,952,939	507,529,188	3.51%	

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>St. Catharines</i> Realty Tax Class	-----Tax Ratios-----			-----Tax Rates-----		
	2018 Actual	2019 Start Ratio	Change %	2018 Actual	2019 Revenue Neutral (Notional)	Change %
<i>Taxable</i>						
Residential	1.000000	1.000000	0.00%	0.00538853	0.00519917	-3.51%
Farm	0.250000	0.250000	0.00%	0.00134713	0.00129979	-3.51%
New Multi-Residential	1.000000	1.000000	0.00%	0.00538853	0.00519917	-3.51%
Multi-Residential	1.970000	1.970000	0.00%	0.01061540	0.01024236	-3.51%
Commercial	1.734900	1.734900	0.00%	0.00934856	0.00902004	-3.51%
Industrial	2.630000	2.630000	0.00%	0.01417183	0.01367382	-3.51%
Pipeline	1.702100	1.702100	0.00%	0.00917182	0.00884951	-3.51%
Sub-Total of Taxable Levy				\$89,133,633	\$89,133,564	0.00%
<i>Payment In Lieu</i>						
Residential	1.000000	1.000000	0.00%	0.00538853	0.00519917	-3.51%
Commercial	1.734900	1.734900	0.00%	0.00934856	0.00902004	-3.51%
Industrial	2.630000	2.630000	0.00%	0.01417183	0.01367382	-3.51%
Sub-Total of Payment In Lieu Levy				\$809,267	\$807,567	-0.21%
Total Taxable + PIL Levies Based on Rate Set				\$89,942,900	\$89,941,131	0.00%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>St. Catharines</i>		Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$61,650,484	\$61,321,636	-\$328,848	-0.53%	
Farm	\$155,208	\$165,978	\$10,770	6.94%	
New Multi-Residential	\$297,896	\$305,580	\$7,684	2.58%	
Multi-Residential	\$6,862,894	\$6,881,021	\$18,127	0.26%	
Commercial	\$17,446,538	\$17,775,228	\$328,690	1.88%	
Industrial	\$2,447,152	\$2,414,678	-\$32,474	-1.33%	
Pipeline	\$273,461	\$269,443	-\$4,018	-1.47%	
Sub-Total: Taxable	\$89,133,633	\$89,133,564	-\$69	0.00%	
<i>Payment In Lieu</i>					
Residential	\$16,324	\$16,464	\$140	0.86%	
Commercial	\$762,581	\$759,056	-\$3,525	-0.46%	
Industrial	\$30,362	\$32,047	\$1,685	5.55%	
Sub-Total: Payment In Lieu	\$809,267	\$807,567	-\$1,700	-0.21%	
Total (Taxable + PIL)	\$89,942,900	\$89,941,131	-\$1,769	0.00%	

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>St. Catharines</i>		Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$64,879,836	\$64,364,618	-\$515,218	-0.79%	
Farm	\$163,338	\$174,214	\$10,876	6.66%	
New Multi-Residential	\$313,500	\$320,744	\$7,244	2.31%	
Multi-Residential	\$7,222,389	\$7,222,481	\$92	0.00%	
Commercial	\$18,360,408	\$18,657,285	\$296,877	1.62%	
Industrial	\$2,575,339	\$2,534,500	-\$40,839	-1.59%	
Pipeline	\$287,785	\$282,813	-\$4,972	-1.73%	
Sub-Total: Taxable	\$93,802,595	\$93,556,655	-\$245,940	-0.26%	
<i>Payment In Lieu</i>					
Residential	\$17,179	\$17,282	\$103	0.60%	
Commercial	\$802,525	\$796,721	-\$5,804	-0.72%	
Industrial	\$31,952	\$33,637	\$1,685	5.27%	
Sub-Total: Payment In Lieu	\$851,656	\$847,640	-\$4,016	-0.47%	
Total (Taxable + PIL)	\$94,654,251	\$94,404,295	-\$249,956	-0.26%	

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>St. Catharines</i>		Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$126,530,320	\$125,686,254	-\$844,066	-0.67%	
Farm	\$318,546	\$340,192	\$21,646	6.80%	
New Multi-Residential	\$611,396	\$626,324	\$14,928	2.44%	
Multi-Residential	\$14,085,283	\$14,103,502	\$18,219	0.13%	
Commercial	\$35,806,946	\$36,432,513	\$625,567	1.75%	
Industrial	\$5,022,491	\$4,949,178	-\$73,313	-1.46%	
Pipeline	\$561,246	\$552,256	-\$8,990	-1.60%	
Sub-Total: Taxable	\$182,936,228	\$182,690,219	-\$246,009	-0.13%	
<i>Payment In Lieu</i>					
Residential	\$33,503	\$33,746	\$243	0.73%	
Commercial	\$1,565,106	\$1,555,777	-\$9,329	-0.60%	
Industrial	\$62,314	\$65,684	\$3,370	5.41%	
Sub-Total: Payment In Lieu	\$1,660,923	\$1,655,207	-\$5,716	-0.34%	
Total (Taxable + PIL)	\$184,597,151	\$184,345,426	-\$251,725	-0.14%	

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Thorold</i>	2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	1,841,863,900	1,953,311,560	111,447,660	6.05%
Farm	55,098,600	52,079,240	-3,019,360	-5.48%
Managed Forest	526,600	526,600	0	0.00%
New Multi-Residential	65,945,300	65,945,300	0	0.00%
Multi-Residential	42,120,300	42,120,300	0	0.00%
Commercial	182,905,200	183,881,900	976,700	0.53%
Industrial	74,617,500	72,432,100	-2,185,400	-2.93%
Pipeline	25,451,000	25,610,000	159,000	0.62%
Sub-Total: Taxable	2,288,528,400	2,395,907,000	107,378,600	4.69%
<i>Payment In Lieu</i>				
Residential	5,242,400	4,974,400	-268,000	-5.11%
Farm	491,000	491,000	0	0.00%
Commercial	11,552,400	12,091,400	539,000	4.67%
Industrial	1,597,200	1,731,200	134,000	8.39%
Sub-Total: Payment In Lieu	18,883,000	19,288,000	405,000	2.14%
Total (Taxable + PIL)	2,307,411,400	2,415,195,000	107,783,600	4.67%

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>Thorold</i>				
Realty Tax Class	2017 Full CVA Growth		2018 Full CVA Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	47,125,500	2.63%	111,447,660	6.05%
Farm	-17,294,700	-23.89%	-3,019,360	-5.48%
Managed Forest	99,600	23.33%	0	0.00%
New Multi-Residential	0	0.00%	0	0.00%
Multi-Residential	853,300	2.07%	0	0.00%
Commercial	-1,455,100	-0.79%	976,700	0.53%
Industrial	-2,502,800	-3.25%	-2,185,400	-2.93%
Pipeline	322,000	1.28%	159,000	0.62%
Sub-Total: Taxable	27,147,800	1.20%	107,378,600	4.69%
<i>Payment In Lieu</i>				
Residential	0	0.00%	-268,000	-5.11%
Farm	0	0.00%	0	0.00%
Commercial	0	0.00%	539,000	4.67%
Industrial	0	0.00%	134,000	8.39%
Sub-Total: Payment In Lieu	0	0.00%	405,000	2.14%
Total (Taxable + PIL)	27,147,800	1.19%	107,783,600	4.67%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>Thorold</i>	2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	1,741,742,306	1,848,166,089	106,423,783	6.11%
Farm	49,761,655	46,924,130	-2,837,525	-5.70%
Managed Forest	464,631	464,631	0	0.00%
New Multi-Residential	61,583,150	61,583,150	0	0.00%
Multi-Residential	40,542,894	40,542,894	0	0.00%
Commercial	167,991,038	168,980,091	989,053	0.59%
Industrial	70,156,956	68,141,746	-2,015,210	-2.87%
Pipeline	24,133,000	24,284,559	151,559	0.63%
Sub-Total: Taxable	2,156,375,630	2,259,087,290	102,711,660	4.76%
<i>Payment In Lieu</i>				
Residential	4,719,430	4,456,200	-263,230	-5.58%
Farm	431,500	431,500	0	0.00%
Commercial	10,799,600	11,337,344	537,744	4.98%
Industrial	1,516,950	1,645,882	128,932	8.50%
Sub-Total: Payment In Lieu	17,467,480	17,870,926	403,446	2.31%
Total (Taxable + PIL)	2,173,843,110	2,276,958,216	103,115,106	4.74%

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Thorold</i>	2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	\$10,204,537	\$10,828,055	\$623,517	6.11%
Farm	\$72,886	\$68,730	-\$4,156	-5.70%
Managed Forest	\$681	\$681	\$0	0.00%
New Multi-Residential	\$360,804	\$360,804	\$0	0.00%
Multi-Residential	\$467,940	\$467,940	\$0	0.00%
Commercial	\$1,674,220	\$1,681,627	\$7,408	0.44%
Industrial	\$988,214	\$961,595	-\$26,618	-2.69%
Pipeline	\$240,661	\$242,172	\$1,511	0.63%
Sub-Total: Taxable	\$14,009,943	\$14,611,604	\$601,662	4.29%
<i>Payment In Lieu</i>				
Residential	\$27,650	\$26,107	-\$1,542	-5.58%
Farm	\$632	\$632	\$0	0.00%
Commercial	\$109,773	\$115,238	\$5,466	4.98%
Industrial	\$23,374	\$25,361	\$1,987	8.50%
Sub-Total: Payment In Lieu	\$161,429	\$167,338	\$5,911	3.66%
Total (Taxable + PIL)	\$14,171,372	\$14,778,942	\$607,573	4.29%

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Thorold</i>				
Realty Tax Class	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	\$289,969	3.02%	\$623,517	6.11%
Farm	-\$6,458	-8.57%	-\$4,156	-5.70%
Managed Forest	\$103	19.40%	\$0	0.00%
New Multi-Residential	\$0	0.00%	\$0	0.00%
Multi-Residential	\$11,266	2.48%	\$0	0.00%
Commercial	-\$7,856	-0.48%	\$7,408	0.44%
Industrial	-\$32,354	-3.26%	-\$26,618	-2.69%
Pipeline	\$2,900	1.26%	\$1,511	0.63%
Sub-Total: Taxable	\$257,570	1.93%	\$601,662	4.29%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	-\$1,542	-5.58%
Farm	\$0	0.00%	\$0	0.00%
Commercial	\$0	0.00%	\$5,466	4.98%
Industrial	\$0	0.00%	\$1,987	8.50%
Sub-Total: Payment In Lieu	\$0	0.00%	\$5,911	3.66%
Total (Taxable + PIL)	\$257,570	1.91%	\$607,573	4.29%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Thorold</i>	Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	1,848,166,089	1,900,738,851	52,572,762	2.84%
Farm	46,924,130	49,501,686	2,577,556	5.49%
Managed Forest	464,631	495,616	30,985	6.67%
New Multi-Residential	61,583,150	63,764,225	2,181,075	3.54%
Multi-Residential	40,542,894	41,331,597	788,703	1.95%
Commercial	168,980,091	176,430,999	7,450,908	4.41%
Industrial	68,141,746	70,286,923	2,145,177	3.15%
Pipeline	24,284,559	24,947,280	662,721	2.73%
Sub-Total: Taxable	2,259,087,290	2,327,497,177	68,409,887	3.03%
<i>Payment In Lieu</i>				
Residential	4,456,200	4,715,300	259,100	5.81%
Farm	431,500	461,250	29,750	6.89%
Commercial	11,337,344	11,714,372	377,028	3.33%
Industrial	1,645,882	1,688,541	42,659	2.59%
Sub-Total: Payment In Lieu	17,870,926	18,579,463	708,537	3.96%
Total (Taxable + PIL)	2,276,958,216	2,346,076,640	69,118,424	3.04%

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>Threshold</i> Realty Tax Class	-----Tax Ratios-----			-----Tax Rates-----		
	2018 Actual	2019 Start Ratio	Change %	2018 Actual	2019 Revenue Neutral (Notional)	Change %
<i>Taxable</i>						
Residential	1.000000	1.000000	0.00%	0.00585881	0.00568796	-2.92%
Farm	0.250000	0.250000	0.00%	0.00146470	0.00142199	-2.92%
Managed Forest	0.250000	0.250000	0.00%	0.00146470	0.00142199	-2.92%
New Multi-Residential	1.000000	1.000000	0.00%	0.00585881	0.00568796	-2.92%
Multi-Residential	1.970000	1.970000	0.00%	0.01154186	0.01120528	-2.92%
Commercial	1.734900	1.734900	0.00%	0.01016445	0.00986804	-2.92%
Industrial	2.630000	2.630000	0.00%	0.01540867	0.01495933	-2.92%
Pipeline	1.702100	1.702100	0.00%	0.00997228	0.00968148	-2.92%
Sub-Total of Taxable Levy				\$14,611,604	\$14,611,609	0.00%
<i>Payment In Lieu</i>						
Residential	1.000000	1.000000	0.00%	0.00585881	0.00568796	-2.92%
Farm	0.250000	0.250000	0.00%	0.00146470	0.00142199	-2.92%
Commercial	1.734900	1.734900	0.00%	0.01016445	0.00986804	-2.92%
Industrial	2.630000	2.630000	0.00%	0.01540867	0.01495933	-2.92%
Sub-Total of Payment In Lieu Levy				\$167,338	\$168,334	0.60%
Total Taxable + PIL Levies Based on Rate Set				\$14,778,942	\$14,779,943	0.01%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Thorold</i>	Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$10,828,055	\$10,811,327	-\$16,728	-0.15%
Farm	\$68,730	\$70,391	\$1,661	2.42%
Managed Forest	\$681	\$705	\$24	3.52%
New Multi-Residential	\$360,804	\$362,688	\$1,884	0.52%
Multi-Residential	\$467,940	\$463,132	-\$4,808	-1.03%
Commercial	\$1,681,627	\$1,703,445	\$21,818	1.30%
Industrial	\$961,595	\$958,394	-\$3,201	-0.33%
Pipeline	\$242,172	\$241,527	-\$645	-0.27%
Sub-Total: Taxable	\$14,611,604	\$14,611,609	\$5	0.00%
<i>Payment In Lieu</i>				
Residential	\$26,107	\$26,821	\$714	2.73%
Farm	\$632	\$656	\$24	3.80%
Commercial	\$115,238	\$115,598	\$360	0.31%
Industrial	\$25,361	\$25,259	-\$102	-0.40%
Sub-Total: Payment In Lieu	\$167,338	\$168,334	\$996	0.60%
Total (Taxable + PIL)	\$14,778,942	\$14,779,943	\$1,001	0.01%

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Thorold</i>	Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$10,480,561	\$10,372,655	-\$107,906	-1.03%
Farm	\$66,524	\$67,535	\$1,011	1.52%
Managed Forest	\$659	\$676	\$17	2.58%
New Multi-Residential	\$349,225	\$347,972	-\$1,253	-0.36%
Multi-Residential	\$452,923	\$444,340	-\$8,583	-1.90%
Commercial	\$1,627,661	\$1,634,327	\$6,666	0.41%
Industrial	\$930,737	\$919,508	-\$11,229	-1.21%
Pipeline	\$234,401	\$231,727	-\$2,674	-1.14%
Sub-Total: Taxable	\$14,142,691	\$14,018,740	-\$123,951	-0.88%
<i>Payment In Lieu</i>				
Residential	\$25,270	\$25,732	\$462	1.83%
Farm	\$612	\$629	\$17	2.78%
Commercial	\$111,539	\$110,907	-\$632	-0.57%
Industrial	\$24,547	\$24,235	-\$312	-1.27%
Sub-Total: Payment In Lieu	\$161,968	\$161,503	-\$465	-0.29%
Total (Taxable + PIL)	\$14,304,659	\$14,180,243	-\$124,416	-0.87%

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Thorold</i>	Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$21,308,616	\$21,183,982	-\$124,634	-0.58%
Farm	\$135,254	\$137,926	\$2,672	1.98%
Managed Forest	\$1,340	\$1,381	\$41	3.06%
New Multi-Residential	\$710,029	\$710,660	\$631	0.09%
Multi-Residential	\$920,863	\$907,472	-\$13,391	-1.45%
Commercial	\$3,309,288	\$3,337,772	\$28,484	0.86%
Industrial	\$1,892,332	\$1,877,902	-\$14,430	-0.76%
Pipeline	\$476,573	\$473,254	-\$3,319	-0.70%
Sub-Total: Taxable	\$28,754,295	\$28,630,349	-\$123,946	-0.43%
<i>Payment In Lieu</i>				
Residential	\$51,377	\$52,553	\$1,176	2.29%
Farm	\$1,244	\$1,285	\$41	3.30%
Commercial	\$226,777	\$226,505	-\$272	-0.12%
Industrial	\$49,908	\$49,494	-\$414	-0.83%
Sub-Total: Payment In Lieu	\$329,306	\$329,837	\$531	0.16%
Total (Taxable + PIL)	\$29,083,601	\$28,960,186	-\$123,415	-0.42%

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Wainfleet</i>	2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	891,881,215	906,926,515	15,045,300	1.69%
Farm	202,814,303	203,726,703	912,400	0.45%
Managed Forest	1,548,900	1,590,100	41,200	2.66%
Multi-Residential	457,000	457,000	0	0.00%
Commercial	21,407,300	20,883,700	-523,600	-2.45%
Industrial	4,108,200	4,108,200	0	0.00%
Pipeline	5,525,000	5,530,000	5,000	0.09%
Sub-Total: Taxable	1,127,741,918	1,143,222,218	15,480,300	1.37%
<i>Payment In Lieu</i>				
Residential	275,200	275,200	0	0.00%
Commercial	1,316,000	1,316,000	0	0.00%
Industrial	10,600	10,600	0	0.00%
Sub-Total: Payment In Lieu	1,601,800	1,601,800	0	0.00%
Total (Taxable + PIL)	1,129,343,718	1,144,824,018	15,480,300	1.37%

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>Wainfleet</i>				
Realty Tax Class	2017 Full CVA Growth		2018 Full CVA Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	2,938,115	0.33%	15,045,300	1.69%
Farm	1,168,603	0.58%	912,400	0.45%
Managed Forest	32,700	2.16%	41,200	2.66%
Multi-Residential	0	0.00%	0	0.00%
Commercial	-1,007,600	-4.50%	-523,600	-2.45%
Industrial	158,600	4.02%	0	0.00%
Pipeline	34,000	0.62%	5,000	0.09%
Sub-Total: Taxable	3,324,418	0.30%	15,480,300	1.37%
<i>Payment In Lieu</i>				
Residential	0	0.00%	0	0.00%
Commercial	0	0.00%	0	0.00%
Industrial	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	0	0.00%	0	0.00%
Total (Taxable + PIL)	3,324,418	0.30%	15,480,300	1.37%

Local Results Table 2
2018 Local Assessment Growth
 (Phase-Adjusted CVA)

<i>Wainfleet</i>	2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	826,029,436	840,442,450	14,413,014	1.74%
Farm	158,597,930	159,303,036	705,106	0.44%
Managed Forest	1,271,844	1,306,097	34,253	2.69%
Multi-Residential	456,500	456,500	0	0.00%
Commercial	18,794,233	18,267,756	-526,477	-2.80%
Industrial	3,836,852	3,836,852	0	0.00%
Pipeline	5,234,000	5,238,740	4,740	0.09%
Sub-Total: Taxable	1,014,220,795	1,028,851,431	14,630,636	1.44%
<i>Payment In Lieu</i>				
Residential	264,400	264,400	0	0.00%
Commercial	1,249,500	1,249,500	0	0.00%
Industrial	10,250	10,250	0	0.00%
Sub-Total: Payment In Lieu	1,524,150	1,524,150	0	0.00%
Total (Taxable + PIL)	1,015,744,945	1,030,375,581	14,630,636	1.44%

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>Wainfleet</i>	2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	\$4,797,670	\$4,881,382	\$83,712	1.74%
Farm	\$230,289	\$231,313	\$1,024	0.44%
Managed Forest	\$1,847	\$1,896	\$50	2.71%
Multi-Residential	\$5,223	\$5,223	\$0	0.00%
Commercial	\$185,249	\$179,944	-\$5,305	-2.86%
Industrial	\$57,670	\$57,670	\$0	0.00%
Pipeline	\$51,743	\$51,790	\$47	0.09%
Sub-Total: Taxable	\$5,329,691	\$5,409,218	\$79,528	1.49%
<i>Payment In Lieu</i>				
Residential	\$1,536	\$1,536	\$0	0.00%
Commercial	\$12,591	\$12,591	\$0	0.00%
Industrial	\$157	\$157	\$0	0.00%
Sub-Total: Payment In Lieu	\$14,284	\$14,284	\$0	0.00%
Total (Taxable + PIL)	\$5,343,975	\$5,423,502	\$79,528	1.49%

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Wainfleet</i>		2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
Realty Tax Class		\$	%	\$	%
<i>Taxable</i>					
Residential		\$18,935	0.41%	\$83,712	1.74%
Farm		\$1,191	0.60%	\$1,024	0.44%
Managed Forest		\$27	1.64%	\$50	2.71%
Multi-Residential		\$0	0.00%	\$0	0.00%
Commercial		-\$5,532	-3.02%	-\$5,305	-2.86%
Industrial		\$3,247	6.10%	\$0	0.00%
Pipeline		\$319	0.63%	\$47	0.09%
Sub-Total: Taxable		\$18,187	0.35%	\$79,528	1.49%
<i>Payment In Lieu</i>					
Residential		\$0	0.00%	\$0	0.00%
Commercial		\$0	0.00%	\$0	0.00%
Industrial		\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu		\$0	0.00%	\$0	0.00%
Total (Taxable + PIL)		\$18,187	0.35%	\$79,528	1.49%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Wainfleet</i>	Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	840,442,450	873,684,483	33,242,033	3.96%
Farm	159,303,036	181,514,872	22,211,836	13.94%
Managed Forest	1,306,097	1,448,099	142,002	10.87%
Multi-Residential	456,500	456,750	250	0.05%
Commercial	18,267,756	19,575,728	1,307,972	7.16%
Industrial	3,836,852	3,972,525	135,673	3.54%
Pipeline	5,238,740	5,384,370	145,630	2.78%
Sub-Total: Taxable	1,028,851,431	1,086,036,827	57,185,396	5.56%
<i>Payment In Lieu</i>				
Residential	264,400	269,800	5,400	2.04%
Commercial	1,249,500	1,282,750	33,250	2.66%
Industrial	10,250	10,425	175	1.71%
Sub-Total: Payment In Lieu	1,524,150	1,562,975	38,825	2.55%
Total (Taxable + PIL)	1,030,375,581	1,087,599,802	57,224,221	5.55%

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>Wainfleet</i> Realty Tax Class	-----Tax Ratios-----		-----Tax Rates-----		Change %
	2018 Actual	2019 Start Ratio	2018 Actual	2019 Revenue Neutral (Notional)	
<i>Taxable</i>					
Residential	1.000000	1.000000	0.00580811	0.00555981	-4.28%
Farm	0.250000	0.250000	0.00145203	0.00138995	-4.28%
Managed Forest	0.250000	0.250000	0.00145203	0.00138995	-4.28%
Multi-Residential	1.970000	1.970000	0.01144197	0.01095283	-4.27%
Commercial	1.734900	1.734900	0.01007649	0.00964571	-4.28%
Industrial	2.630000	2.630000	0.01527532	0.01462230	-4.28%
Pipeline	1.702100	1.702100	0.00988598	0.00946335	-4.28%
Sub-Total of Taxable Levy			\$5,409,218	\$5,409,221	0.00%
<i>Payment In Lieu</i>					
Residential	1.000000	1.000000	0.00580811	0.00555981	-4.28%
Commercial	1.734900	1.734900	0.01007649	0.00964571	-4.28%
Industrial	2.630000	2.630000	0.01527532	0.01462230	-4.28%
Sub-Total of Payment In Lieu Levy			\$14,284	\$14,025	-1.81%
Total Taxable + PIL Levies Based on Rate Set			\$5,423,502	\$5,423,246	0.00%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Wainfleet</i>	Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$4,881,382	\$4,857,520	-\$23,862	-0.49%
Farm	\$231,313	\$252,297	\$20,984	9.07%
Managed Forest	\$1,896	\$2,013	\$117	6.17%
Multi-Residential	\$5,223	\$5,003	-\$220	-4.21%
Commercial	\$179,944	\$184,317	\$4,373	2.43%
Industrial	\$57,670	\$57,117	-\$553	-0.96%
Pipeline	\$51,790	\$50,954	-\$836	-1.61%
Sub-Total: Taxable	\$5,409,218	\$5,409,221	\$3	0.00%
<i>Payment In Lieu</i>				
Residential	\$1,536	\$1,500	-\$36	-2.34%
Commercial	\$12,591	\$12,373	-\$218	-1.73%
Industrial	\$157	\$152	-\$5	-3.18%
Sub-Total: Payment In Lieu	\$14,284	\$14,025	-\$259	-1.81%
Total (Taxable + PIL)	\$5,423,502	\$5,423,246	-\$256	0.00%

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Wainfleet</i>	Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$4,765,972	\$4,767,845	\$1,873	0.04%
Farm	\$225,844	\$247,639	\$21,795	9.65%
Managed Forest	\$1,852	\$1,976	\$124	6.70%
Multi-Residential	\$5,100	\$4,910	-\$190	-3.73%
Commercial	\$175,688	\$180,914	\$5,226	2.97%
Industrial	\$56,306	\$56,063	-\$243	-0.43%
Pipeline	\$50,566	\$50,014	-\$552	-1.09%
Sub-Total: Taxable	\$5,281,328	\$5,309,361	\$28,033	0.53%
<i>Payment In Lieu</i>				
Residential	\$1,500	\$1,472	-\$28	-1.87%
Commercial	\$12,293	\$12,145	-\$148	-1.20%
Industrial	\$153	\$150	-\$3	-1.96%
Sub-Total: Payment In Lieu	\$13,946	\$13,767	-\$179	-1.28%
Total (Taxable + PIL)	\$5,295,274	\$5,323,128	\$27,854	0.53%

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Wainfleet</i>	Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$9,647,354	\$9,625,365	-\$21,989	-0.23%
Farm	\$457,157	\$499,936	\$42,779	9.36%
Managed Forest	\$3,748	\$3,989	\$241	6.43%
Multi-Residential	\$10,323	\$9,913	-\$410	-3.97%
Commercial	\$355,632	\$365,231	\$9,599	2.70%
Industrial	\$113,976	\$113,180	-\$796	-0.70%
Pipeline	\$102,356	\$100,968	-\$1,388	-1.36%
Sub-Total: Taxable	\$10,690,546	\$10,718,582	\$28,036	0.26%
<i>Payment In Lieu</i>				
Residential	\$3,036	\$2,972	-\$64	-2.11%
Commercial	\$24,884	\$24,518	-\$366	-1.47%
Industrial	\$310	\$302	-\$8	-2.58%
Sub-Total: Payment In Lieu	\$28,230	\$27,792	-\$438	-1.55%
Total (Taxable + PIL)	\$10,718,776	\$10,746,374	\$27,598	0.26%

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>Welland</i>	2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	4,080,024,627	4,140,240,667	60,216,040	1.48%
Farm	22,640,900	22,036,600	-604,300	-2.67%
Managed Forest	771,400	998,400	227,000	29.43%
New Multi-Residential	9,776,500	10,203,500	427,000	4.37%
Multi-Residential	162,471,800	163,032,900	561,100	0.35%
Commercial	405,387,800	416,432,620	11,044,820	2.72%
Industrial	73,551,800	79,746,640	6,194,840	8.42%
Landfill	455,400	455,400	0	0.00%
Pipeline	20,784,000	20,854,000	70,000	0.34%
Sub-Total: Taxable	4,775,864,227	4,854,000,727	78,136,500	1.64%
<i>Payment In Lieu</i>				
Residential	930,600	930,600	0	0.00%
Commercial	11,101,000	11,262,000	161,000	1.45%
Industrial	521,500	521,500	0	0.00%
Landfill	1,334,300	1,334,300	0	0.00%
Sub-Total: Payment In Lieu	13,887,400	14,048,400	161,000	1.16%
Total (Taxable + PIL)	4,789,751,627	4,868,049,127	78,297,500	1.63%

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>Welland</i>	2017 Full CVA Growth		2018 Full CVA Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	65,462,400	1.63%	60,216,040	1.48%
Farm	99,400	0.44%	-604,300	-2.67%
Managed Forest	-156,100	-16.83%	227,000	29.43%
New Multi-Residential	1,750,300	21.81%	427,000	4.37%
Multi-Residential	-638,000	-0.39%	561,100	0.35%
Commercial	-4,945,600	-1.21%	11,044,820	2.72%
Industrial	-1,190,100	-1.59%	6,194,840	8.42%
Landfill	59,900	15.15%	0	0.00%
Pipeline	77,000	0.37%	70,000	0.34%
Sub-Total: Taxable	60,519,200	1.28%	78,136,500	1.64%
<i>Payment In Lieu</i>				
Residential	0	0.00%	0	0.00%
Commercial	-10,400	-0.09%	161,000	1.45%
Industrial	1,700	0.33%	0	0.00%
Landfill	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	-8,700	-0.06%	161,000	1.16%
Total (Taxable + PIL)	60,510,500	1.28%	78,297,500	1.63%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>Welland</i>	2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	3,862,070,815	3,919,777,830	57,707,015	1.49%
Farm	18,385,122	17,897,924	-487,198	-2.65%
Managed Forest	631,354	833,518	202,164	32.02%
New Multi-Residential	9,449,400	9,858,900	409,500	4.33%
Multi-Residential	158,313,150	158,898,700	585,550	0.37%
Commercial	372,255,283	382,936,264	10,680,981	2.87%
Industrial	68,533,470	74,849,601	6,316,131	9.22%
Landfill	312,850	312,850	0	0.00%
Pipeline	19,884,500	19,951,457	66,957	0.34%
Sub-Total: Taxable	4,509,835,944	4,585,317,044	75,481,100	1.67%
<i>Payment In Lieu</i>				
Residential	858,300	858,300	0	0.00%
Commercial	10,675,650	10,836,650	161,000	1.51%
Industrial	466,593	466,593	0	0.00%
Landfill	886,150	886,150	0	0.00%
Sub-Total: Payment In Lieu	12,886,693	13,047,693	161,000	1.25%
Total (Taxable + PIL)	4,522,722,637	4,598,364,737	75,642,100	1.67%

Local Results Table 3
2018 Local Revenue Growth
 (Annualized)

<i>Welland</i>	2018 Local General Levy		Annualized Growth	
Realty Tax Class	As Returned	As Revised	\$	%
<i>Taxable</i>				
Residential	\$29,865,937	\$30,312,873	\$446,936	1.50%
Farm	\$35,598	\$34,655	-\$943	-2.65%
Managed Forest	\$1,222	\$1,614	\$391	32.00%
New Multi-Residential	\$73,185	\$76,356	\$3,172	4.33%
Multi-Residential	\$2,415,458	\$2,424,392	\$8,934	0.37%
Commercial	\$4,928,315	\$5,042,530	\$114,213	2.32%
Industrial	\$1,356,598	\$1,488,453	\$131,854	9.72%
Landfill	\$7,124	\$7,124	\$0	0.00%
Pipeline	\$262,130	\$263,012	\$883	0.34%
Sub-Total: Taxable	\$38,945,567	\$39,651,009	\$705,440	1.81%
<i>Payment In Lieu</i>				
Residential	\$6,646	\$6,646	\$0	0.00%
Commercial	\$143,314	\$145,477	\$2,163	1.51%
Industrial	\$9,494	\$9,494	\$0	0.00%
Landfill	\$20,179	\$20,179	\$0	0.00%
Sub-Total: Payment In Lieu	\$179,633	\$181,796	\$2,163	1.20%
Total (Taxable + PIL)	\$39,125,200	\$39,832,805	\$707,603	1.81%

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>Welland</i>	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	\$458,668	1.60%	\$446,936	1.50%
Farm	\$160	0.51%	-\$943	-2.65%
Managed Forest	-\$289	-20.99%	\$391	32.00%
New Multi-Residential	\$12,006	20.01%	\$3,172	4.33%
Multi-Residential	-\$6,183	-0.25%	\$8,934	0.37%
Commercial	-\$12,735	-0.27%	\$114,213	2.32%
Industrial	-\$1,111	-0.08%	\$131,854	9.72%
Landfill	\$329	6.35%	\$0	0.00%
Pipeline	\$927	0.36%	\$883	0.34%
Sub-Total: Taxable	\$451,772	1.21%	\$705,440	1.81%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	\$0	0.00%
Commercial	-\$138	-0.10%	\$2,163	1.51%
Industrial	\$23	0.26%	\$0	0.00%
Landfill	\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu	-\$115	-0.07%	\$2,163	1.20%
Total (Taxable + PIL)	\$451,657	1.20%	\$707,603	1.81%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>Welland</i>	Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%
<i>Taxable</i>				
Residential	3,919,777,830	4,030,009,274	110,231,444	2.81%
Farm	17,897,924	19,967,262	2,069,338	11.56%
Managed Forest	833,518	915,957	82,439	9.89%
New Multi-Residential	9,858,900	10,031,200	172,300	1.75%
Multi-Residential	158,898,700	160,965,800	2,067,100	1.30%
Commercial	382,936,264	399,684,448	16,748,184	4.37%
Industrial	74,849,601	77,298,122	2,448,521	3.27%
Landfill	312,850	384,125	71,275	22.78%
Pipeline	19,951,457	20,402,728	451,271	2.26%
Sub-Total: Taxable	4,585,317,044	4,719,658,916	134,341,872	2.93%
<i>Payment In Lieu</i>				
Residential	858,300	894,450	36,150	4.21%
Commercial	10,836,650	11,049,325	212,675	1.96%
Industrial	466,593	494,046	27,453	5.88%
Landfill	886,150	1,110,225	224,075	25.29%
Sub-Total: Payment In Lieu	13,047,693	13,548,046	500,353	3.83%
Total (Taxable + PIL)	4,598,364,737	4,733,206,962	134,842,225	2.93%

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>Welland</i> Realty Tax Class	-----Tax Ratios-----			-----Tax Rates-----		
	2018 Actual	2019 Start Ratio	Change %	2018 Actual	2019 Revenue Neutral (Notional)	Change %
<i>Taxable</i>						
Residential	1.000000	1.000000	0.00%	0.00774491	0.00752403	-2.85%
Farm	0.250000	0.250000	0.00%	0.00193623	0.00188101	-2.85%
Managed Forest	0.250000	0.250000	0.00%	0.00193623	0.00188101	-2.85%
New Multi-Residential	1.000000	1.000000	0.00%	0.00774491	0.00752403	-2.85%
Multi-Residential	1.970000	1.970000	0.00%	0.01525747	0.01482234	-2.85%
Commercial	1.734900	1.734900	0.00%	0.01343664	0.01305344	-2.85%
Industrial	2.630000	2.630000	0.00%	0.02036910	0.01978820	-2.85%
Landfill	2.940261	2.940261	0.00%	0.02277205	0.02212261	-2.85%
Pipeline	1.702100	1.702100	0.00%	0.01318261	0.01280665	-2.85%
Sub-Total of Taxable Levy				\$39,651,009	\$39,650,997	0.00%
<i>Payment In Lieu</i>						
Residential	1.000000	1.000000	0.00%	0.00774491	0.00752403	-2.85%
Commercial	1.734900	1.734900	0.00%	0.01343664	0.01305344	-2.85%
Industrial	2.630000	2.630000	0.00%	0.02036910	0.01978820	-2.85%
Landfill	2.940261	2.940261	0.00%	0.02277205	0.02212261	-2.85%
Sub-Total of Payment In Lieu Levy				\$181,796	\$185,161	1.85%
Total Taxable + PIL Levies Based on Rate Set				\$39,832,805	\$39,836,158	0.01%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>Welland</i>	Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$30,312,873	\$30,277,742	-\$35,131	-0.12%
Farm	\$34,655	\$37,559	\$2,904	8.38%
Managed Forest	\$1,614	\$1,723	\$109	6.75%
New Multi-Residential	\$76,356	\$75,475	-\$881	-1.15%
Multi-Residential	\$2,424,392	\$2,385,890	-\$38,502	-1.59%
Commercial	\$5,042,530	\$5,113,055	\$70,525	1.40%
Industrial	\$1,488,453	\$1,489,764	\$1,311	0.09%
Landfill	\$7,124	\$8,498	\$1,374	19.29%
Pipeline	\$263,012	\$261,291	-\$1,721	-0.65%
Sub-Total: Taxable	\$39,651,009	\$39,650,997	-\$12	0.00%
<i>Payment In Lieu</i>				
Residential	\$6,646	\$6,730	\$84	1.26%
Commercial	\$145,477	\$144,104	-\$1,373	-0.94%
Industrial	\$9,494	\$9,766	\$272	2.86%
Landfill	\$20,179	\$24,561	\$4,382	21.72%
Sub-Total: Payment In Lieu	\$181,796	\$185,161	\$3,365	1.85%
Total (Taxable + PIL)	\$39,832,805	\$39,836,158	\$3,353	0.01%

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>Welland</i>	Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$22,194,956	\$21,960,410	-\$234,546	-1.06%
Farm	\$25,374	\$27,241	\$1,867	7.36%
Managed Forest	\$1,182	\$1,250	\$68	5.75%
New Multi-Residential	\$55,908	\$54,742	-\$1,166	-2.09%
Multi-Residential	\$1,775,130	\$1,730,482	-\$44,648	-2.52%
Commercial	\$3,692,118	\$3,708,490	\$16,372	0.44%
Industrial	\$1,089,839	\$1,080,524	-\$9,315	-0.85%
Landfill	\$5,216	\$6,163	\$947	18.16%
Pipeline	\$192,576	\$189,514	-\$3,062	-1.59%
Sub-Total: Taxable	\$29,032,299	\$28,758,816	-\$273,483	-0.94%
<i>Payment In Lieu</i>				
Residential	\$4,867	\$4,881	\$14	0.29%
Commercial	\$106,517	\$104,518	-\$1,999	-1.88%
Industrial	\$6,951	\$7,084	\$133	1.91%
Landfill	\$14,775	\$17,814	\$3,039	20.57%
Sub-Total: Payment In Lieu	\$133,110	\$134,297	\$1,187	0.89%
Total (Taxable + PIL)	\$29,165,409	\$28,893,113	-\$272,296	-0.93%

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>Welland</i>	Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%
<i>Taxable</i>				
Residential	\$52,507,829	\$52,238,152	-\$269,677	-0.51%
Farm	\$60,029	\$64,800	\$4,771	7.95%
Managed Forest	\$2,796	\$2,973	\$177	6.33%
New Multi-Residential	\$132,264	\$130,217	-\$2,047	-1.55%
Multi-Residential	\$4,199,522	\$4,116,372	-\$83,150	-1.98%
Commercial	\$8,734,648	\$8,821,545	\$86,897	0.99%
Industrial	\$2,578,292	\$2,570,288	-\$8,004	-0.31%
Landfill	\$12,340	\$14,661	\$2,321	18.81%
Pipeline	\$455,588	\$450,805	-\$4,783	-1.05%
Sub-Total: Taxable	\$68,683,308	\$68,409,813	-\$273,495	-0.40%
<i>Payment In Lieu</i>				
Residential	\$11,513	\$11,611	\$98	0.85%
Commercial	\$251,994	\$248,622	-\$3,372	-1.34%
Industrial	\$16,445	\$16,850	\$405	2.46%
Landfill	\$34,954	\$42,375	\$7,421	21.23%
Sub-Total: Payment In Lieu	\$314,906	\$319,458	\$4,552	1.45%
Total (Taxable + PIL)	\$68,998,214	\$68,729,271	-\$268,943	-0.39%

Local Results Table 1
2018 Local Assessment Growth
(Full / Non Phase-Adjusted CVA)

<i>West Lincoln</i>		2018 Full CVA		Full CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	1,659,881,125	1,701,978,431	42,097,306	2.54%	
Farm	470,314,275	471,822,739	1,508,464	0.32%	
Managed Forest	1,925,400	2,028,600	103,200	5.36%	
Multi-Residential	7,074,000	7,074,000	0	0.00%	
Commercial	71,997,000	76,770,800	4,773,800	6.63%	
Industrial	32,910,900	34,194,100	1,283,200	3.90%	
Pipeline	28,586,000	29,028,000	442,000	1.55%	
Sub-Total: Taxable	2,272,688,700	2,322,896,670	50,207,970	2.21%	
<i>Payment In Lieu</i>					
Residential	403,500	403,500	0	0.00%	
Commercial	2,908,300	2,908,300	0	0.00%	
Industrial	112,500	105,100	-7,400	-6.58%	
Landfill	371,700	371,700	0	0.00%	
Sub-Total: Payment In Lieu	3,796,000	3,788,600	-7,400	-0.19%	
Total (Taxable + PIL)	2,276,484,700	2,326,685,270	50,200,570	2.21%	

Local Results Table 1-B
Year-To-Year Assessment Growth Comparison
(Full / Non Phase-Adjusted CVA)

<i>West Lincoln</i>	2017 Full CVA Growth		2018 Full CVA Growth	
Realty Tax Class	\$	%	\$	%
<i>Taxable</i>				
Residential	51,743,525	3.22%	42,097,306	2.54%
Farm	-5,075,225	-1.07%	1,508,464	0.32%
Managed Forest	-14,900	-0.77%	103,200	5.36%
Multi-Residential	-993,000	-12.31%	0	0.00%
Commercial	767,300	1.08%	4,773,800	6.63%
Industrial	8,424,100	34.40%	1,283,200	3.90%
Pipeline	204,000	0.72%	442,000	1.55%
Sub-Total: Taxable	55,055,800	2.48%	50,207,970	2.21%
<i>Payment In Lieu</i>				
Residential	0	0.00%	0	0.00%
Commercial	0	0.00%	0	0.00%
Industrial	0	0.00%	-7,400	-6.58%
Landfill	0	0.00%	0	0.00%
Sub-Total: Payment In Lieu	0	0.00%	-7,400	-0.19%
Total (Taxable + PIL)	55,055,800	2.48%	50,200,570	2.21%

Local Results Table 2
2018 Local Assessment Growth
(Phase-Adjusted CVA)

<i>West Lincoln</i>		2018 Phased CVA		Phased CVA Growth	
Realty Tax Class	As Returned	As Revised	\$	%	
<i>Taxable</i>					
Residential	1,510,592,050	1,549,004,656	38,412,606	2.54%	
Farm	363,908,545	365,396,886	1,488,341	0.41%	
Managed Forest	1,564,695	1,647,978	83,283	5.32%	
Multi-Residential	6,633,500	6,633,500	0	0.00%	
Commercial	67,304,853	72,029,664	4,724,811	7.02%	
Industrial	31,760,421	33,009,697	1,249,276	3.93%	
Pipeline	26,907,000	27,330,728	423,728	1.57%	
Sub-Total: Taxable	2,008,671,064	2,055,053,109	46,382,045	2.31%	
<i>Payment In Lieu</i>					
Residential	398,500	398,500	0	0.00%	
Commercial	2,775,800	2,775,800	0	0.00%	
Industrial	104,900	97,500	-7,400	-7.05%	
Landfill	371,700	371,700	0	0.00%	
Sub-Total: Payment In Lieu	3,650,900	3,643,500	-7,400	-0.20%	
Total (Taxable + PIL)	2,012,321,964	2,058,696,609	46,374,645	2.30%	

Local Results Table 3
2018 Local Revenue Growth
(Annualized)

<i>West Lincoln</i>					
Realty Tax Class	2018 Local General Levy	As Returned	As Revised	Annualized Growth	
				\$	%
<i>Taxable</i>					
Residential	\$5,212,403	\$5,344,949	\$132,546	2.54%	
Farm	\$313,922	\$315,206	\$1,284	0.41%	
Managed Forest	\$1,350	\$1,422	\$72	5.33%	
Multi-Residential	\$45,092	\$45,092	\$0	0.00%	
Commercial	\$397,682	\$426,321	\$28,640	7.20%	
Industrial	\$285,068	\$295,801	\$10,735	3.77%	
Pipeline	\$158,031	\$160,519	\$2,489	1.58%	
Sub-Total: Taxable	\$6,413,548	\$6,589,310	\$175,766	2.74%	
<i>Payment In Lieu</i>					
Residential	\$1,375	\$1,375	\$0	0.00%	
Commercial	\$16,617	\$16,617	\$0	0.00%	
Industrial	\$952	\$885	-\$67	-7.04%	
Landfill	\$3,771	\$3,771	\$0	0.00%	
Sub-Total: Payment In Lieu	\$22,715	\$22,648	-\$67	-0.29%	
Total (Taxable + PIL)	\$6,436,263	\$6,611,958	\$175,699	2.73%	

Local Results Table 3-B
Year-To-Year Annualized Local Revenue Growth Comparison
(Local General Purpose Levy)

<i>West Lincoln</i>				
Realty Tax Class	2017 Local Annualized Revenue Growth		2018 Local Annualized Revenue Growth	
	\$	%	\$	%
<i>Taxable</i>				
Residential	\$163,259	3.39%	\$132,546	2.54%
Farm	-\$3,058	-1.12%	\$1,284	0.41%
Managed Forest	-\$7	-0.58%	\$72	5.33%
Multi-Residential	-\$4,729	-9.60%	\$0	0.00%
Commercial	\$4,355	1.12%	\$28,640	7.20%
Industrial	\$72,262	34.51%	\$10,735	3.77%
Pipeline	\$1,086	0.71%	\$2,489	1.58%
Sub-Total: Taxable	\$233,168	3.96%	\$175,766	2.74%
<i>Payment In Lieu</i>				
Residential	\$0	0.00%	\$0	0.00%
Commercial	\$0	0.00%	\$0	0.00%
Industrial	\$0	0.00%	-\$67	-7.04%
Landfill	\$0	0.00%	\$0	0.00%
Sub-Total: Payment In Lieu	\$0	0.00%	-\$67	-0.29%
Total (Taxable + PIL)	\$233,168	3.94%	\$175,699	2.73%

Local Results Table 4
Year-Over-Year Phase-In Change
 (2018 to 2019 Phased CVA)

<i>West Lincoln</i>		Phase Adjusted CVA		Change	
Realty Tax Class	2018 Revised	2019 Returned	\$	%	
<i>Taxable</i>					
Residential	1,549,004,656	1,625,491,549	76,486,893	4.94%	
Farm	365,396,886	418,609,818	53,212,932	14.56%	
Managed Forest	1,647,978	1,838,289	190,311	11.55%	
Multi-Residential	6,633,500	6,853,750	220,250	3.32%	
Commercial	72,029,664	74,400,234	2,370,570	3.29%	
Industrial	33,009,697	33,601,898	592,201	1.79%	
Pipeline	27,330,728	28,179,364	848,636	3.11%	
Sub-Total: Taxable	2,055,053,109	2,188,974,902	133,921,793	6.52%	
<i>Payment In Lieu</i>					
Residential	398,500	401,000	2,500	0.63%	
Commercial	2,775,800	2,842,050	66,250	2.39%	
Industrial	97,500	101,300	3,800	3.90%	
Landfill	371,700	371,700	0	0.00%	
Sub-Total: Payment In Lieu	3,643,500	3,716,050	72,550	1.99%	
Total (Taxable + PIL)	2,058,696,609	2,192,690,952	133,994,343	6.51%	

Local Results Table 5
Starting Ratios and Revenue Neutral (Notional) Tax Rates
(Local General Levy)

<i>West Lincoln</i> Realty Tax Class	-----Tax Ratios-----		-----Tax Rates-----	
	2018 Actual	2019 Start Ratio	Change %	2018 Actual 2019 Revenue Netural (Notional)
<i>Taxable</i>				
Residential	1.000000	1.000000	0.00%	0.00328346 -4.84%
Farm	0.250000	0.250000	0.00%	0.00082087 -4.84%
Managed Forest	0.250000	0.250000	0.00%	0.00082087 -4.84%
Multi-Residential	1.970000	1.970000	0.00%	0.00646842 -4.84%
Commercial	1.734900	1.734900	0.00%	0.00598639 -4.84%
Industrial	2.630000	2.630000	0.00%	0.00863550 -4.84%
Pipeline	1.702100	1.702100	0.00%	0.00558878 -4.84%
Sub-Total of Taxable Levy				\$6,589,310 \$6,589,308 0.00%
<i>Payment In Lieu</i>				
Residential	1.000000	1.000000	0.00%	0.00328346 -4.84%
Commercial	1.734900	1.734900	0.00%	0.00598639 -4.84%
Industrial	2.630000	2.630000	0.00%	0.00863550 -4.84%
Landfill	2.940261	2.940261	0.00%	0.00965423 -4.84%
Sub-Total of Payment In Lieu Levy				\$22,648 \$21,969 -3.00%
Total Taxable + PIL Levies Based on Rate Set				\$6,611,958 \$6,611,277 -0.01%

NOTE: These results are based on preliminary start ratios and notional levy amounts and are subject to change based on municipal policy decisions, spending decisions and/or Provincial tax policy updates. No rates or ratios should be considered final, or used for actual taxation purposes until final by-laws are passed.

Local Results Table 6
Year-Over-Year Interclass Tax Shifts
(Local General Levy)

<i>West Lincoln</i>		Local General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$5,344,949	\$5,337,236	-\$7,713	-0.14%	
Farm	\$315,206	\$343,624	\$28,418	9.02%	
Managed Forest	\$1,422	\$1,509	\$87	6.12%	
Multi-Residential	\$45,092	\$44,333	-\$759	-1.68%	
Commercial	\$426,321	\$418,644	-\$7,677	-1.80%	
Industrial	\$295,801	\$286,474	-\$9,327	-3.15%	
Pipeline	\$160,519	\$157,488	-\$3,031	-1.89%	
Sub-Total: Taxable	\$6,589,310	\$6,589,308	-\$2	0.00%	
<i>Payment In Lieu</i>					
Residential	\$1,375	\$1,317	-\$58	-4.22%	
Commercial	\$16,617	\$16,189	-\$428	-2.58%	
Industrial	\$885	\$875	-\$10	-1.13%	
Landfill	\$3,771	\$3,588	-\$183	-4.85%	
Sub-Total: Payment In Lieu	\$22,648	\$21,969	-\$679	-3.00%	
Total (Taxable + PIL)	\$6,611,958	\$6,611,277	-\$681	-0.01%	

Local Results Table 7
Year-Over-Year Upper-Tier Levy Shifts
 (Upper-Tier General Levy)

<i>West Lincoln</i>		Upper-Tier General Levy		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$8,784,080	\$8,870,584	\$86,504	0.98%	
Farm	\$518,023	\$571,105	\$53,082	10.25%	
Managed Forest	\$2,336	\$2,508	\$172	7.36%	
Multi-Residential	\$74,106	\$73,682	-\$424	-0.57%	
Commercial	\$700,632	\$695,794	-\$4,838	-0.69%	
Industrial	\$486,133	\$476,125	-\$10,008	-2.06%	
Pipeline	\$263,803	\$261,748	-\$2,055	-0.78%	
Sub-Total: Taxable	\$10,829,113	\$10,951,546	\$122,433	1.13%	
<i>Payment In Lieu</i>					
Residential	\$2,260	\$2,188	-\$72	-3.19%	
Commercial	\$27,309	\$26,907	-\$402	-1.47%	
Industrial	\$1,454	\$1,454	\$0	0.00%	
Landfill	\$6,198	\$5,964	-\$234	-3.78%	
Sub-Total: Payment In Lieu	\$37,221	\$36,513	-\$708	-1.90%	
Total (Taxable + PIL)	\$10,866,334	\$10,988,059	\$121,725	1.12%	

Local Results Table 8
Year-Over-Year Municipal Levy Shifts
 (Upper-Tier and Local General Levy Amounts)

<i>West Lincoln</i>		Municipal General Levies (UT + Local)		Change	
Realty Tax Class	2018 as Revised	2019 Notional	\$	%	
<i>Taxable</i>					
Residential	\$14,129,029	\$14,207,820	\$78,791	0.56%	
Farm	\$833,229	\$914,729	\$81,500	9.78%	
Managed Forest	\$3,758	\$4,017	\$259	6.89%	
Multi-Residential	\$119,198	\$118,015	-\$1,183	-0.99%	
Commercial	\$1,126,953	\$1,114,438	-\$12,515	-1.11%	
Industrial	\$781,934	\$762,599	-\$19,335	-2.47%	
Pipeline	\$424,322	\$419,236	-\$5,086	-1.20%	
Sub-Total: Taxable	\$17,418,423	\$17,540,854	\$122,431	0.70%	
<i>Payment In Lieu</i>					
Residential	\$3,635	\$3,505	-\$130	-3.58%	
Commercial	\$43,926	\$43,096	-\$830	-1.89%	
Industrial	\$2,339	\$2,329	-\$10	-0.43%	
Landfill	\$9,969	\$9,552	-\$417	-4.18%	
Sub-Total: Payment In Lieu	\$59,869	\$58,482	-\$1,387	-2.32%	
Total (Taxable + PIL)	\$17,478,292	\$17,599,336	\$121,044	0.69%	

Performance Measures

The table below provides the 2018 measures for total property taxes for Niagara verses the 2018 BMA study average. Note that the study results are based on 2018 rates, and therefore are not impacted by 2019 tax policy decisions and approved budgets.

Table 1 – 2018 BMA Study – Total Property Taxes and Municipal Burden

	Niagara Average*	Study Average	Variance		Comparison to Study
			\$	%	
Total Property Taxes (\$) Per Median Dwelling Value	\$3,832	\$3,836	(4)	(0.10)	Below
Total Property Taxes as % of Hhld. Income	4.0%	3.8%			Above
Total Municipal Burden: Taxes and W/WW (\$)	\$4,768	\$4,910	(142)	(2.89)	Below
Total Municipal Burden: Taxes and W/WW as % of Hhld. Income	4.9%	4.8%			Above

*Calculated using a simple average of all LAMs (weighted average is 5.2%).

The combined Niagara Region, Local Area Municipalities, and education tax levy compares competitively to the BMA study average for 108 Ontario Municipalities surveyed. Total taxes as classified by BMA are in the mid-range tax burden for all but the Large Industrial and Office buildings which is in the low-range and Hotels which are in the high-range. The Region is above the study average in seven categories per Table 2 below.

Table 2 – 2018 BMA Study Tax Metrics by Property Class

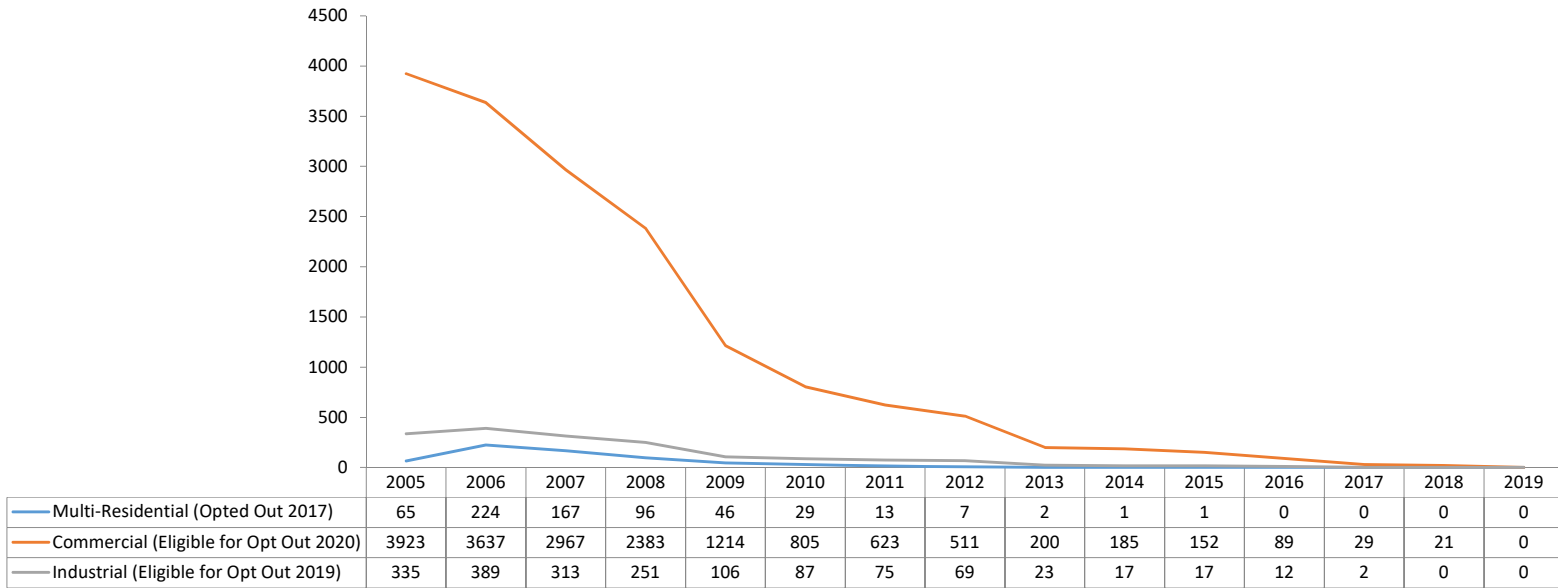
Property Class	Property Type	Comparison Metric	Niagara Average* (\$)	Study Average (\$)	Variance		Comparison to Study
					\$	%	
Residential	Bungalow	Tax/Unit	3,466	3,397	69	2.03%	Above
	2 Storey	Tax/Unit	4,656	4,524	132	2.92%	Above
	Executive	Tax/Unit	6,296	6,286	10	0.16%	Above
Multi-Res	Walk-Up	Tax/Unit	1,577	1,382	195	14.11%	Above
	Mid/High-Rise	Tax/Unit	1,716	1,715	1	0.06%	Par
Commercial	Office Buildings***	Tax/ Sq. Ft.	2.77	3.04	(0.27)	-8.88%	Below
	Shopping	Tax/ Sq. Ft.	3.75	2.63	1.12	42.59%	Above
	Hotels**	Tax/Unit	1,844	1,602	242	15.11%	Above
	Motels	Tax/Unit	1,084	1,240	(156)	-12.58%	Below
Industrial	Industrial Vacant Land	Tax/Acre	3,118	3,673	(555)	-15.11%	Below
	Standard Industrial	Tax/ Sq. Ft.	1.82	1.67	0.15	8.98%	Above
	Large Industrial***	Tax/ Sq. Ft.	0.87	1.11	(0.24)	-21.62%	Below

*Calculated using a simple average of all LAMs.

**Classified to be in the high range.

***Classified to be in the low range.

Number of Properties Impacted by Capping



History of Regional Tax Ratios

Realty Tax Class	2014 Ratios	2015 Ratios	2016 Ratios	2017 Ratios	2018 Ratios	2019 Start Ratios	Ranges of Fairness		Threshold Ratios	
							Lower Limit	Upper Limit	Threshold	Subject to Levy Restriction
Residential	1.000000	1.000000	1.000000	1.000000	1.000000	1.000000	1.00	1.00	-	N/A
Farm	0.250000	0.250000	0.250000	0.250000	0.250000	0.250000	-	0.25	-	N/A
Managed Forest	0.250000	0.250000	0.250000	0.250000	0.250000	0.250000	0.25	0.25	-	N/A
New Mult-Res	1.000000	1.000000	1.000000	1.000000	1.000000	1.000000	1.00	1.10	-	N/A
Multi-Residential	2.044000	2.044000	2.044000	2.000000	1.970000	1.970000	1.00	1.10	2.00	No
Commercial	1.758600	1.758600	1.758600	1.758600	1.734900	1.734900	0.60	1.10	1.98	No
Industrial	2.630000	2.630000	2.630000	2.630000	2.630000	2.630000	0.60	1.10	2.63	No
Landfill	N/A	N/A	N/A	2.940261	2.940261	2.940261	0.60	1.10	25.00	No
Pipeline	1.702100	1.702100	1.702100	1.702100	1.702100	1.702100	0.60	0.70	-	N/A

Subject: Asset Management Policy**Report to:** Corporate Services Committee**Report date:** Wednesday, April 17, 2019

Recommendations

That the Asset Management Policy, Appendix 2 to Report CSD 20-2019, **BE APPROVED.**

Key Facts

- The purpose of this report is to obtain Council's approval of the strategic Asset Management (AM) Policy which, upon approval, will be published on the Region's website.
- The Region's capital asset portfolio replacement value is in excess of \$7.4 billion.
- In 2017, the Ontario government released a new regulation under the Infrastructure for Jobs and Prosperity Act, 2015 – Ontario Regulation 588/17, Asset Management Planning for Municipal Infrastructure (O. Reg. 588/17) which outlines deadlines for achieving strategic AM practices.
- Under O. Reg. 588/17 the Region is required to create, approve and publish a strategic AM Policy by July 1, 2019.
- In addition to O. Reg. 588/17 Federal and Provincial governments require updated comprehensive AM plans for Federal Gas Tax funding, future application based funding and Development Charges.
- The AM Policy, which forms the basis for AM at the Region, will be implemented along with procedures and will be enforced by the corporate Asset Management Office (AMO).

Financial Considerations

There are no immediate financial implications related to the approval of the AM Policy. The adoption of the AM Policy will establish the framework for performing AM activities consistently across the Region, leading to more effective and comprehensive financial planning for the sustainment of existing assets and the creation of new ones.

As articulated in CSD 10-2019, Asset Management Governance Model, the implementation of a corporate AMO is expected to result in savings related to capital asset budgeting, on-going maintenance costs and utilities savings. These savings will be a result of the Region being able to make corporate wide risk and condition based prioritization decisions to ensure that the projects that are approved deliver the best return for the Region. It will implement processes and procedures across the Region

that will better identify other lifecycle activities that may be undertaken and the ideal timing for them to sustain the level of service (LOS) of the asset and prolong the useful life at the most effective cost for the Region. The AMO will also help the Region better coordinate efforts across divisions and with local municipalities to ensure interconnected projects are completed concurrently, therefore reducing scenarios where assets are replaced before the end of their useful life.

Analysis

The Region has embarked on a multi-year phased AM Program to develop and implement leading AM principles and practices. O. Reg. 588/17, was released in December 2016 and came into effect on January 1, 2017. Per O. Reg. 588/17, several legislative requirements are to be included in the AM Policy, including commitments to consider climate change risks to infrastructure assets and mitigation approaches to address these vulnerabilities, to provide opportunities for municipal residents and other interested parties to provide input into AM planning, and to coordinate planning for AM with other local municipalities where infrastructure assets connect or are interrelated.

The requirements and timelines the Region needs to accomplish per O/ Reg. 588/17 include the following:

- July 2019: Strategic AM Policy approved and published
- July 2021: Core infrastructure AMP and current LOS
- July 2023: Comprehensive AMP and current LOS
- July 2024: Alignment of the Comprehensive AMP to the proposed LOS and financing strategy to achieve the proposed LOS
- Continuous updates to these every 5-years.

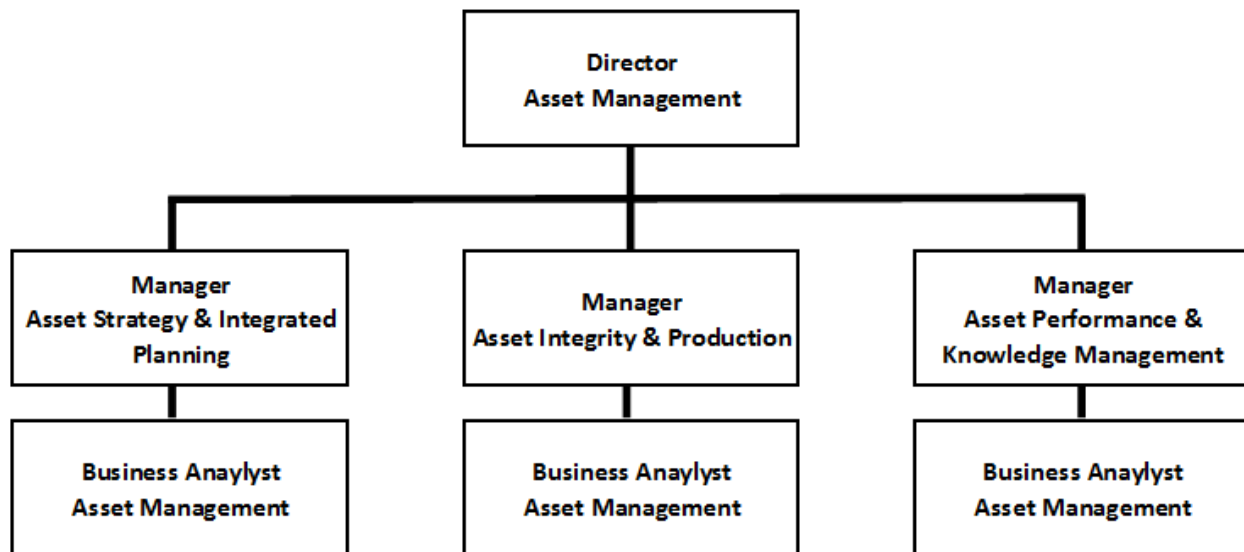
AM is a systematic process to guide planning, acquisition, operation, maintenance, rehabilitation, replacement and disposal of assets and is considered to be a fundamental element in an asset-intensive organization's operations, as the efficient allocation and management of resources are crucial to maximize performance and fulfil strategic goals.

Council has advanced AM at the Region through approval of the following:

- CBPCOTW-C 2-2017 – Asset Management Project – Asset Management Roadmap and Information Technology Strategy;
- CSD 21-2017 – Asset Management Plan – 2016 AM plan;
- CSD 10-2019 Asset Management Governance Model – Council endorsed the creation of a corporate AMO with the structure outlined in Figure 1;
- CSD 20-2019 – Asset Management Policy

Looking forward, in the second quarter of 2020 Council will receive the annual update on the status of AM at the Region and progress made during the year. This update is in-line with this policies requirement that Council annually approves the review of AM progress before July 1 every year.

Figure 1: Corporate Asset Management Office Proposed Structure



The AMO will provide leadership in the use of consistent AM policies, procedures and practices across the Region's departments, boards and commissions, and will result in the most effective use of Regional resources while ensuring capital decisions are based on effective management of infrastructure risks, and balance the lowest cost of service (COS) while providing the desired levels of service (LOS), as per Image 1. The AMO will also ensure that all departments, boards and commissions adhere to the established policies, procedures and practices to ensure AM is consistent across the organization.

Image 1: Relationship between LOS, COS and Risk



The Region is the custodian of capital assets with an estimated \$7.4 billion replacement value, which are required to deliver services to the residents of Niagara. The AM Policy establishes the foundation and framework for AM at the Region to help ensure that the Region is doing the right work, on the right assets, at the right time, for the right costs and the right reasons.

Staff developed the AM policy by conducting workshops with cross departmental and ABC representation, in collaboration with external expertise, to ensure all regulatory requirements were addressed while being conscious of Regional impacts. The resulting policy was provided to the AM Steering Team for final review prior to recommendation to this committee. The policy address the requirements of O. Reg. 588/17 with the inclusion of the following:

- Considering the AM plans in the development of the budget and any long-range financial plans that take into account municipal infrastructure assets;
- Identifying the executive lead who is responsible for AM at the Region;
- Recognizing the impact on service delivery by considering input from residents and business, local municipalities and other Regional departments and ABCs;
- Alignment of AM planning with climate change implications and considering mitigation approaches to climate change, such as green house gas reduction goals and targets; and
- Commitment to align AM planning with financial plans such as those prepared under the Safe Drinking Water Act 2002 and those developed to support wastewater assets.

Alternatives Reviewed

This policy was written as the Region's response to the requirements established by the Province of Ontario under O. Reg 588/17, while also including industry leading practice recommendations. The Region is required to be compliant with O. Reg. 588/17 by publishing of a strategic AM Policy before July 1, 2019.

Relationship to Council Strategic Priorities

The Comprehensive AM Plan was identified as a priority of the previous Council that directly supports Organizational Excellence, as well as supporting the Infrastructure and Taxation priorities.

Other Pertinent Reports

CPBCOTW-C 2-2017	Asset Management Project
CSD 21-2017	Asset Management Plan
CSD 51-2018	Asset Management Governance
CSD 10-2019	Asset Management Governance Model

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Français

ONTARIO REGULATION 588/17

made under the

INFRASTRUCTURE FOR JOBS AND PROSPERITY ACT, 2015

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ASSET MANAGEMENT PLANNING FOR MUNICIPAL INFRASTRUCTURE

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INTERPRETATION AND APPLICATION

Definitions

1. (1) In this Regulation,

“asset category” means a category of municipal infrastructure assets that is,

- (a) an aggregate of assets described in each of clauses (a) to (e) of the definition of core municipal infrastructure asset, or
- (b) composed of any other aggregate of municipal infrastructure assets that provide the same type of service; (“catégorie de biens”)

“core municipal infrastructure asset” means any municipal infrastructure asset that is a,

- (a) water asset that relates to the collection, production, treatment, storage, supply or distribution of water,
- (b) wastewater asset that relates to the collection, transmission, treatment or disposal of wastewater, including any wastewater asset that from time to time manages stormwater,
- (c) stormwater management asset that relates to the collection, transmission, treatment, retention, infiltration, control or disposal of stormwater,
- (d) road, or
- (e) bridge or culvert; (“bien d’infrastructure municipale essentiel”)

“ecological functions” has the same meaning as in Ontario Regulation 140/02 (Oak Ridges Moraine Conservation Plan) made under the *Oak Ridges Moraine Conservation Act, 2001*; (“fonctions écologiques”)

“green infrastructure asset” means an infrastructure asset consisting of natural or human-made elements that provide ecological and hydrological functions and processes and includes natural heritage features and systems, parklands,

- stormwater management systems, street trees, urban forests, natural channels, permeable surfaces and green roofs; (“bien d’infrastructure verte”)
- “hydrological functions” has the same meaning as in Ontario Regulation 140/02; (“fonctions hydrologiques”)
- “joint municipal water board” means a joint board established in accordance with a transfer order made under the *Municipal Water and Sewage Transfer Act, 1997*; (“conseil mixte de gestion municipale des eaux”)
- “lifecycle activities” means activities undertaken with respect to a municipal infrastructure asset over its service life, including constructing, maintaining, renewing, operating and decommissioning, and all engineering and design work associated with those activities; (“activités relatives au cycle de vie”)
- “municipal infrastructure asset” means an infrastructure asset, including a green infrastructure asset, directly owned by a municipality or included on the consolidated financial statements of a municipality, but does not include an infrastructure asset that is managed by a joint municipal water board; (“bien d’infrastructure municipale”)
- “municipality” has the same meaning as in the *Municipal Act, 2001*; (“municipalité”)
- “operating costs” means the aggregate of costs, including energy costs, of operating a municipal infrastructure asset over its service life; (“frais d’exploitation”)
- “service life” means the total period during which a municipal infrastructure asset is in use or is available to be used; (“durée de vie”)
- “significant operating costs” means, where the operating costs with respect to all municipal infrastructure assets within an asset category are in excess of a threshold amount set by the municipality, the total amount of those operating costs. (“frais d’exploitation importants”)
- (2) In Tables 1 and 2,
- “connection-days” means the number of properties connected to a municipal system that are affected by a service issue, multiplied by the number of days on which those properties are affected by the service issue. (“jours-branchements”)
- (3) In Table 4,
- “arterial roads” means Class 1 and Class 2 highways as determined under the Table to section 1 of Ontario Regulation 239/02 (Minimum Maintenance Standards for Municipal Highways) made under the *Municipal Act, 2001*; (“artères”)
- “collector roads” means Class 3 and Class 4 highways as determined under the Table to section 1 of Ontario Regulation 239/02; (“routes collectrices”)
- “lane-kilometre” means a kilometre-long segment of roadway that is a single lane in width; (“kilomètre de voie”)
- “local roads” means Class 5 and Class 6 highways as determined under the Table to section 1 of Ontario Regulation 239/02. (“routes locales”)
- (4) In Table 5,
- “Ontario Structure Inspection Manual” means the Ontario Structure Inspection Manual (OSIM), published by the Ministry of Transportation and dated October 2000 (revised November 2003 and April 2008) and available on a Government of Ontario website; (“manuel d’inspection des structures de l’Ontario”)
- “structural culvert” has the meaning set out for “culvert (structural)” in the Ontario Structure Inspection Manual. (“ponceau structurel”)

Application

2. For the purposes of section 6 of the Act, every municipality is prescribed as a broader public sector entity to which that section applies.

STRATEGIC ASSET MANAGEMENT POLICIES

Strategic asset management policy

3. (1) Every municipality shall prepare a strategic asset management policy that includes the following:
1. Any of the municipality’s goals, policies or plans that are supported by its asset management plan.
 2. The process by which the asset management plan is to be considered in the development of the municipality’s budget or of any long-term financial plans of the municipality that take into account municipal infrastructure assets.
 3. The municipality’s approach to continuous improvement and adoption of appropriate practices regarding asset management planning.
 4. The principles to be followed by the municipality in its asset management planning, which must include the principles set out in section 3 of the Act.

5. The municipality's commitment to consider, as part of its asset management planning,
 - i. the actions that may be required to address the vulnerabilities that may be caused by climate change to the municipality's infrastructure assets, in respect of such matters as,
 - A. operations, such as increased maintenance schedules,
 - B. levels of service, and
 - C. lifecycle management,
 - ii. the anticipated costs that could arise from the vulnerabilities described in subparagraph i,
 - iii. adaptation opportunities that may be undertaken to manage the vulnerabilities described in subparagraph i,
 - iv. mitigation approaches to climate change, such as greenhouse gas emission reduction goals and targets, and
 - v. disaster planning and contingency funding.
6. A process to ensure that the municipality's asset management planning is aligned with any of the following financial plans:
 - i. Financial plans related to the municipality's water assets including any financial plans prepared under the *Safe Drinking Water Act, 2002*.
 - ii. Financial plans related to the municipality's wastewater assets.
7. A process to ensure that the municipality's asset management planning is aligned with Ontario's land-use planning framework, including any relevant policy statements issued under subsection 3 (1) of the *Planning Act*, any provincial plans as defined in the *Planning Act* and the municipality's official plan.
8. An explanation of the capitalization thresholds used to determine which assets are to be included in the municipality's asset management plan and how the thresholds compare to those in the municipality's tangible capital asset policy, if it has one.
9. The municipality's commitment to coordinate planning for asset management, where municipal infrastructure assets connect or are interrelated with those of its upper-tier municipality, neighbouring municipalities or jointly-owned municipal bodies.
10. The persons responsible for the municipality's asset management planning, including the executive lead.
11. An explanation of the municipal council's involvement in the municipality's asset management planning.
12. The municipality's commitment to provide opportunities for municipal residents and other interested parties to provide input into the municipality's asset management planning.

(2) For the purposes of this section,

"capitalization threshold" is the value of a municipal infrastructure asset at or above which a municipality will capitalize the value of it and below which it will expense the value of it. ("seuil de capitalisation")

Update of asset management policy

4. Every municipality shall prepare its first strategic asset management policy by July 1, 2019 and shall review and, if necessary, update it at least every five years.

ASSET MANAGEMENT PLANS

Asset management plans, current levels of service

5. (1) Every municipality shall prepare an asset management plan in respect of its core municipal infrastructure assets by July 1, 2021, and in respect of all of its other municipal infrastructure assets by July 1, 2023.

(2) A municipality's asset management plan must include the following:

1. For each asset category, the current levels of service being provided, determined in accordance with the following qualitative descriptions and technical metrics and based on data from at most the two calendar years prior to the year in which all information required under this section is included in the asset management plan:
 - i. With respect to core municipal infrastructure assets, the qualitative descriptions set out in Column 2 and the technical metrics set out in Column 3 of Table 1, 2, 3, 4 or 5, as the case may be.
 - ii. With respect to all other municipal infrastructure assets, the qualitative descriptions and technical metrics established by the municipality.
2. The current performance of each asset category, determined in accordance with the performance measures established by the municipality, such as those that would measure energy usage and operating efficiency, and based on data from

at most two calendar years prior to the year in which all information required under this section is included in the asset management plan.

3. For each asset category,
 - i. a summary of the assets in the category,
 - ii. the replacement cost of the assets in the category,
 - iii. the average age of the assets in the category, determined by assessing the average age of the components of the assets,
 - iv. the information available on the condition of the assets in the category, and
 - v. a description of the municipality's approach to assessing the condition of the assets in the category, based on recognized and generally accepted good engineering practices where appropriate.
 4. For each asset category, the lifecycle activities that would need to be undertaken to maintain the current levels of service as described in paragraph 1 for each of the 10 years following the year for which the current levels of service under paragraph 1 are determined and the costs of providing those activities based on an assessment of the following:
 - i. The full lifecycle of the assets.
 - ii. The options for which lifecycle activities could potentially be undertaken to maintain the current levels of service.
 - iii. The risks associated with the options referred to in subparagraph ii.
 - iv. The lifecycle activities referred to in subparagraph ii that can be undertaken for the lowest cost to maintain the current levels of service.
 5. For municipalities with a population of less than 25,000, as reported by Statistics Canada in the most recent official census, the following:
 - i. A description of assumptions regarding future changes in population or economic activity.
 - ii. How the assumptions referred to in subparagraph i relate to the information required by paragraph 4.
 6. For municipalities with a population of 25,000 or more, as reported by Statistics Canada in the most recent official census, the following:
 - i. With respect to municipalities in the Greater Golden Horseshoe growth plan area, if the population and employment forecasts for the municipality are set out in Schedule 3 or 7 to the 2017 Growth Plan, those forecasts.
 - ii. With respect to lower-tier municipalities in the Greater Golden Horseshoe growth plan area, if the population and employment forecasts for the municipality are not set out in Schedule 7 to the 2017 Growth Plan, the portion of the forecasts allocated to the lower-tier municipality in the official plan of the upper-tier municipality of which it is a part.
 - iii. With respect to upper-tier municipalities or single-tier municipalities outside of the Greater Golden Horseshoe growth plan area, the population and employment forecasts for the municipality that are set out in its official plan.
 - iv. With respect to lower-tier municipalities outside of the Greater Golden Horseshoe growth plan area, the population and employment forecasts for the lower-tier municipality that are set out in the official plan of the upper-tier municipality of which it is a part.
 - v. If, with respect to any municipality referred to in subparagraph iii or iv, the population and employment forecasts for the municipality cannot be determined as set out in those subparagraphs, a description of assumptions regarding future changes in population or economic activity.
 - vi. For each of the 10 years following the year for which the current levels of service under paragraph 1 are determined, the estimated capital expenditures and significant operating costs related to the lifecycle activities required to maintain the current levels of service in order to accommodate projected increases in demand caused by growth, including estimated capital expenditures and significant operating costs related to new construction or to upgrading of existing municipal infrastructure assets.
- (3) Every asset management plan must indicate how all background information and reports upon which the information required by paragraph 3 of subsection (2) is based will be made available to the public.
- (4) In this section,
- “2017 Growth Plan” means the Growth Plan for the Greater Golden Horseshoe, 2017 that was approved under subsection 7 (6) of the *Places to Grow Act*, 2005 on May 16, 2017 and came into effect on July 1, 2017: (“Plan de croissance de 2017”)

“Greater Golden Horseshoe growth plan area” means the area designated by section 2 of Ontario Regulation 416/05 (Growth Plan Areas) made under the *Places to Grow Act, 2005*. (“zone de croissance planifiée de la région élargie du Golden Horseshoe”)

Asset management plans, proposed levels of service

6. (1) Subject to subsection (2), by July 1, 2024, every asset management plan prepared under section 5 must include the following additional information:

1. For each asset category, the levels of service that the municipality proposes to provide for each of the 10 years following the year in which all information required under section 5 and this section is included in the asset management plan, determined in accordance with the following qualitative descriptions and technical metrics:
 - i. With respect to core municipal infrastructure assets, the qualitative descriptions set out in Column 2 and the technical metrics set out in Column 3 of Table 1, 2, 3, 4 or 5, as the case may be.
 - ii. With respect to all other municipal infrastructure assets, the qualitative descriptions and technical metrics established by the municipality.
2. An explanation of why the proposed levels of service under paragraph 1 are appropriate for the municipality, based on an assessment of the following:
 - i. The options for the proposed levels of service and the risks associated with those options to the long term sustainability of the municipality.
 - ii. How the proposed levels of service differ from the current levels of service set out under paragraph 1 of subsection 5 (2).
 - iii. Whether the proposed levels of service are achievable.
 - iv. The municipality’s ability to afford the proposed levels of service.
3. The proposed performance of each asset category for each year of the 10-year period referred to in paragraph 1, determined in accordance with the performance measures established by the municipality, such as those that would measure energy usage and operating efficiency.
4. A lifecycle management and financial strategy that sets out the following information with respect to the assets in each asset category for the 10-year period referred to in paragraph 1:
 - i. An identification of the lifecycle activities that would need to be undertaken to provide the proposed levels of service described in paragraph 1, based on an assessment of the following:
 - A. The full lifecycle of the assets.
 - B. The options for which lifecycle activities could potentially be undertaken to achieve the proposed levels of service.
 - C. The risks associated with the options referred to in sub-subparagraph B.
 - D. The lifecycle activities referred to in sub-subparagraph B that can be undertaken for the lowest cost to achieve the proposed levels of service.
 - ii. An estimate of the annual costs for each of the 10 years of undertaking the lifecycle activities identified in subparagraph i, separated into capital expenditures and significant operating costs.
 - iii. An identification of the annual funding projected to be available to undertake lifecycle activities and an explanation of the options examined by the municipality to maximize the funding projected to be available.
 - iv. If, based on the funding projected to be available, the municipality identifies a funding shortfall for the lifecycle activities identified in subparagraph i,
 - A. an identification of the lifecycle activities, whether set out in subparagraph i or otherwise, that the municipality will undertake, and
 - B. if applicable, an explanation of how the municipality will manage the risks associated with not undertaking any of the lifecycle activities identified in subparagraph i.
5. For municipalities with a population of less than 25,000, as reported by Statistics Canada in the most recent official census, a discussion of how the assumptions regarding future changes in population and economic activity, set out in subparagraph 5 i of subsection 5 (2), informed the preparation of the lifecycle management and financial strategy referred to in paragraph 4 of this subsection.
6. For municipalities with a population of 25,000 or more, as reported by Statistics Canada in the most recent official census,

- i. the estimated capital expenditures and significant operating costs to achieve the proposed levels of service as described in paragraph 1 in order to accommodate projected increases in demand caused by population and employment growth, as set out in the forecasts or assumptions referred to in paragraph 6 of subsection 5 (2), including estimated capital expenditures and significant operating costs related to new construction or to upgrading of existing municipal infrastructure assets,
- ii. the funding projected to be available, by source, as a result of increased population and economic activity, and
- iii. an overview of the risks associated with implementation of the asset management plan and any actions that would be proposed in response to those risks.

7. An explanation of any other key assumptions underlying the plan that have not previously been explained.

(2) With respect to an asset management plan prepared under section 5 on or before July 1, 2021, if the additional information required under this section is not included before July 1, 2023, the municipality shall, before including the additional information, update the current levels of service set out under paragraph 1 of subsection 5 (2) and the current performance measures set out under paragraph 2 of subsection 5 (2) based on data from the two most recent calendar years.

Update of asset management plans

7. (1) Every municipality shall review and update its asset management plan at least five years after the year in which the plan is completed under section 6 and at least every five years thereafter.

(2) The updated asset management plan must comply with the requirements set out under paragraphs 1, 2 and 3 and subparagraphs 5 i and 6 i, ii, iii, iv and v of subsection 5 (2), subsection 5 (3) and paragraphs 1 to 7 of subsection 6 (1).

Endorsement and approval required

8. Every asset management plan prepared under section 5 or 6, or updated under section 7, must be,

- (a) endorsed by the executive lead of the municipality; and
- (b) approved by a resolution passed by the municipal council.

Annual review of asset management planning progress

9. (1) Every municipal council shall conduct an annual review of its asset management progress on or before July 1 in each year, starting the year after the municipality's asset management plan is completed under section 6.

(2) The annual review must address,

- (a) the municipality's progress in implementing its asset management plan;
- (b) any factors impeding the municipality's ability to implement its asset management plan; and
- (c) a strategy to address the factors described in clause (b).

Public availability

10. Every municipality shall post its current strategic asset management policy and asset management plan on a website that is available to the public, and shall provide a copy of the policy and plan to any person who requests it.

TABLE 1
WATER ASSETS

Column 1 Service attribute	Column 2 Community levels of service (qualitative descriptions)	Column 3 Technical levels of service (technical metrics)
Scope	1. Description, which may include maps, of the user groups or areas of the municipality that are connected to the municipal water system. 2. Description, which may include maps, of the user groups or areas of the municipality that have fire flow.	1. Percentage of properties connected to the municipal water system. 2. Percentage of properties where fire flow is available.
Reliability	Description of boil water advisories and service interruptions.	1. The number of connection-days per year where a boil water advisory notice is in place compared to the total number of properties connected to the municipal water system. 2. The number of connection-days per year due to water main breaks compared to the total number of properties connected to the municipal water system.

TABLE 2
WASTEWATER ASSETS

Column 1	Column 2	Column 3
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Service attribute	Community levels of service (qualitative descriptions)	Technical levels of service (technical metrics)
Scope	Description, which may include maps, of the user groups or areas of the municipality that are connected to the municipal wastewater system.	Percentage of properties connected to the municipal wastewater system.
Reliability	<ol style="list-style-type: none"> 1. Description of how combined sewers in the municipal wastewater system are designed with overflow structures in place which allow overflow during storm events to prevent backups into homes. 2. Description of the frequency and volume of overflows in combined sewers in the municipal wastewater system that occur in habitable areas or beaches. 3. Description of how stormwater can get into sanitary sewers in the municipal wastewater system, causing sewage to overflow into streets or backup into homes. 4. Description of how sanitary sewers in the municipal wastewater system are designed to be resilient to avoid events described in paragraph 3. 5. Description of the effluent that is discharged from sewage treatment plants in the municipal wastewater system. 	<ol style="list-style-type: none"> 1. The number of events per year where combined sewer flow in the municipal wastewater system exceeds system capacity compared to the total number of properties connected to the municipal wastewater system. 2. The number of connection-days per year due to wastewater backups compared to the total number of properties connected to the municipal wastewater system. 3. The number of effluent violations per year due to wastewater discharge compared to the total number of properties connected to the municipal wastewater system.

TABLE 3
STORMWATER MANAGEMENT ASSETS

Column 1 Service attribute	Column 2 Community levels of service (qualitative descriptions)	Column 3 Technical levels of service (technical metrics)
Scope	Description, which may include maps, of the user groups or areas of the municipality that are protected from flooding, including the extent of the protection provided by the municipal stormwater management system.	<ol style="list-style-type: none"> 1. Percentage of properties in municipality resilient to a 100-year storm. 2. Percentage of the municipal stormwater management system resilient to a 5-year storm.

TABLE 4
ROADS

Column 1 Service attribute	Column 2 Community levels of service (qualitative descriptions)	Column 3 Technical levels of service (technical metrics)
Scope	Description, which may include maps, of the road network in the municipality and its level of connectivity.	Number of lane-kilometres of each of arterial roads, collector roads and local roads as a proportion of square kilometres of land area of the municipality.
Quality	Description or images that illustrate the different levels of road class pavement condition.	<ol style="list-style-type: none"> 1. For paved roads in the municipality, the average pavement condition index value. 2. For unpaved roads in the municipality, the average surface condition (e.g. excellent, good, fair or poor).

TABLE 5
BRIDGES AND CULVERTS

Column 1 Service attribute	Column 2 Community levels of service (qualitative descriptions)	Column 3 Technical levels of service (technical metrics)
Scope	Description of the traffic that is supported by municipal bridges (e.g., heavy transport vehicles, motor vehicles, emergency vehicles, pedestrians, cyclists).	Percentage of bridges in the municipality with loading or dimensional restrictions.
Quality	<ol style="list-style-type: none"> 1. Description or images of the condition of bridges and how this would affect use of the bridges. 2. Description or images of the condition of culverts and how this would affect use of the culverts. 	<ol style="list-style-type: none"> 1. For bridges in the municipality, the average bridge condition index value. 2. For structural culverts in the municipality, the average bridge condition index value.

COMMENCEMENT

Commencement

11. This Regulation comes into force on the later of January 1, 2018 and the day it is filed.

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Policy Owner	Enterprise Resource Management Services – Corporate Asset Management Division
Approval Body	Regional Council
Approval Date	
Effective Date	May 1, 2019
Review by Date	

1. Policy

The Region shall manage its assets through a coordinated approach that ensures the delivery of a sustainable level of service that strives to be fully funded.

Budgeting

Asset management planning will encompass sound financial analysis that will be completed by a multi-disciplinary team comprised of representative(s) from finance, the corporate asset management office and the concerned Regional department or ABC, and documented in the financial strategy section of the asset management plan. The financial analysis will align with existing financial plans including plans developed in response to the Safe Drinking Water Act. The alignment will stem from the multi-disciplinary team and its use of common analytical methods and common data sources.

The Region will integrate findings from the asset management plans into its long-term financial planning and budgeting processes. This will include the development of financial strategies that determine the level of funding required to achieve the short-term operating and maintenance needs (operating budget), as well as the long-term funding required to replace or rehabilitate the assets throughout their lifecycle (capital budget).

The asset management plan will be referenced by the Regional department or ABC in the preparation of their budget submission to:

- Determine forecasted spending needs identified in the plan;
- Identify all potential revenues and costs (including operating, maintenance, replacement, and decommissioning) associated with forthcoming infrastructure asset decisions;
- Evaluate the validity and need of each significant new capital asset, including considering the impact on future operating and capital costs;
- Incorporate new revenue tools and alternative funding strategies where possible;

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- Analyze risks;
- Prioritize spending needs for the budget submission; and
- Quantify progress in delivering asset management plan requirements and identify potential gaps.

The business cases submitted to support the annual operating and capital budgets are prepared by each Regional department or ABC and will be provided to the Budget Review Committee of the Whole for the approval of the Region's annual budget.

Capital Thresholds

Capital assets whose role in service delivery requires deliberate management by the Region, for example those that are deemed to provide benefits or pose substantial risks to the corporation, will be included in asset management plans. This may include assets that fall below the capitalization threshold as outlined in the Region's tangible capital asset policy.

The scope of these assets will be determined based on their criticality to delivering services, and the professional judgment of senior staff. This qualitative approach is unlike the quantitative and dollar value-based methodology prescribed in the tangible capital asset policy. For this reason, the capitalization threshold developed for financial reporting will not be the guide in determining which assets are to be included in the asset management process.

Community and Long Range Planning

The combination of lifecycle analysis and financial sustainability principles will be the driver in the design and selection of community development or redevelopment that requires new assets, or existing asset enhancements, to take place. Parties involved in the development of the asset management plans will reference the direction established in the community plan as well as the methods, assumptions, and data used in its development. The aim of cross-referencing these plans is to ensure that development and redevelopment occur within the Region's means through understanding and consideration of current and future asset needs and are integrated with infrastructure strategic documents such as master servicing plans and the development charge background study. Areas identified for population and employment growth will be required to consider infrastructure requirements through policies in the Regional Official Plan that link land use to infrastructure master plans such as the Transportation and Water and Wastewater Master Plans.

Climate Change

Climate change will be considered as part of Region's risk management approach embedded in local asset management planning methods. This approach will balance the potential cost of vulnerabilities to climate change impacts and other risks with the cost of reducing these vulnerabilities. The balance will be struck in the levels of service delivered through operations, maintenance schedules, emergency management program,

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contingency funding, and capital investments. The Region's contribution to climate change through greenhouse gas emissions will be mitigated in accordance with its local reduction targets, financial capacity, and stakeholder support. Climate change will be addressed by establishing land use policies in the Regional Official Plan that will consider both mitigation and preservation of natural features.

Stakeholder Engagement

The ultimate goal of the Region is to efficiently provide its various stakeholders with the municipal services they need within the bounds of regulatory requirements, the built environment, and the natural environment. To achieve this goal, the Region will seek to understand the needs of current stakeholders and consider the needs of future generations, and incorporate these perspectives into asset management plans. The Region recognizes the various stakeholders as an integral part of the asset management approach. Accordingly, the Region will:

- Provide opportunities for residents and other stakeholders served by the Region to provide input in asset management planning through engagement in public information sessions related to infrastructure master plans, public meetings in advance of approval of the development charge background study and/or approval of budgets;
- Include opportunities for public engagement which may include public meetings and the use of technology including web-based tools; and
- Coordinate asset management planning with other infrastructure asset owning agencies such as municipal bodies and regulated utilities.

Strategic Alignment

The Region's mission to offer its citizens a healthy, secure, and prosperous lifestyle at an affordable cost requires alignment of many strategic goals, policies and plans at any given time. To promote a shared and involved community, the Region will integrate asset management planning with the overarching accountabilities and aspirations of our community for the good of all. Asset management planning will be aligned with other municipal documents including, but not limited to the following:

- Council strategic plans;
- Growth strategies;
- Infrastructure master plans;
- Development charge background study;
- Financial strategies, such as the 10-year capital forecast and those required under the Safe Drinking Water Act.

2. Purpose

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The Region's vision is to achieve excellence and efficiency in service delivery through all capital assets (owned in whole or in part, leased or managed by the Region), at sustainable asset lifecycle costs, and acceptable levels of risk.

The objective of the AM Policy is to provide a framework and guidance to enable provision of levels of service that are appropriate and affordable for the community.

The AM Policy communicates a shared purpose to staff and other stakeholders to:

- Provide a common corporate approach to asset management with clear accountabilities, roles and responsibilities, and governance;
- Inform lifecycle management decision-making related to growth, upgrades, operations, maintenance, and renewal based on levels of service, cost of service and risk considerations;
- Enable objective prioritization of capital needs across Regional departments and ABC's;
- Foster communication and collaboration among stakeholders;
- Address financial, operational, administrative, regulatory and strategic Region-wide requirements; and
- Establish Guiding Principles as provided in Appendix 1 of the policy (service focused, value-based and affordable, and risk-based principles).

3. Scope

Roles and Responsibilities

The policy requires the commitment and participation of the following key stakeholders within the Region's organizational structure:

Council

- Approves, by resolution, the asset management policy and its updates as necessary every five years.
- Approves, by resolution, the asset management plan and its updates every five years.
- Approves, by resolution, the annual reviews of asset management planning improvement progress on or before July 1 of every year for every year following adoption of the policy.
- Supports ongoing efforts to continuously improve and implement the asset management plans.

Chief Administrative Officer

- Ensures compliance with the asset management policy and provincial asset management regulation.

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Commissioner of Enterprise Resource Management Services (acting as the Executive Lead)

- Endorses the asset management policy and its updates as necessary every five years.
- Endorses the asset management plan and its updates every five years.
- Endorses the annual reviews of asset management planning improvement progress before July 1 of every year for every year following adoption of the policy.
- Supports ongoing efforts to continuously improve and implement the asset management plans.

Corporate Leadership Team and Appointees (acting as the Corporate Asset Management Steering Team)

- Current Corporate Leadership Team and appointees from any applicable Regional ABC.
- Champions and promotes asset management planning activities for capital assets that fall within their Regional department or ABC.
- Supports continuous improvement opportunities and oversees development and adoption of appropriate asset management planning practices including people, processes, data and systems.
- Communicates with stakeholders about the asset management system to increase awareness of their role in asset management decision-making including the value of the activities they are undertaking and the asset information they are providing.

Corporate Asset Management Office

- Reports to the Executive Lead.
- Reviews and updates the asset management policy as necessary every five years based on input from department and ABC leads.
- Prepares the asset management plan and its updates every five years based on input from department and ABC leads.
- Creates necessary guiding strategies, supporting frameworks and procedures at the corporate level to continuously improve and adopt appropriate asset management planning and management practices.
- Conducts annual reviews of asset management planning improvement progress before July 1 of every year that includes progress on ongoing efforts to implement the asset management plans, consideration of the asset management policy, any factors affecting the ability of the Region to implement its asset management plans, consultation with department and ABC leads and a strategy to address these factors including the adoption of appropriate practices.

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- Ensures consistency and standardization for asset management practices across the organization and monitors compliance with the established practices.
- Makes recommendations for system improvements and enhancements to further advance asset management initiatives across the organization.
- Communicates with stakeholders about the asset management system to increase awareness of their role in asset management decision-making including the value of the activities they are undertaking and the asset information they are providing.
- Provides opportunities for residents and other stakeholders served by the Region to provide input in asset management planning.

Corporate Asset Management Practice Networks

- Facilitate coordination and collaboration around the asset lifecycle in the form of knowledge sharing and continuous improvement.

Department and ABC Leads

- Provide input to the asset management plan and its updates every five years.
- Provide input to and review draft operating and capital programs and budgets for the annual budget.
- Communicate with staff within their service area about the asset management system to increase awareness of their role in asset management decision-making including the value of the activities they are undertaking and the asset information they are providing.
- Continuously improve and adopt appropriate asset management planning practices within their service areas based on corporate guiding strategies, supporting frameworks and procedures and ensuring compliance with the corporate Asset Management Policy.
- Coordinate asset management planning with other infrastructure asset owning agencies such as municipal bodies and regulated utilities.
- Implement operational plans such as maintenance programs, capital works programs, and asset management practice improvements in accordance with approved the asset management plan.
- Ensure continuous maintenance and quality of the information in the asset management system.

4. References and Related Documents.

4.1. Legislation, By-Laws and/or Directives

- Ontario Regulation 588/17 – Asset Management Planning for Municipal Infrastructure
- By-law 2017-63 – Budget Control By-law
- By-law 02-2016 – Procurement By-law

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5. Related Policies

- C-F-003 Capital Asset Management Policy

6. Document Control

The electronic version of this document is recognized as the only valid version.

Approval History

Approver(s)	Approved Date	Effective Date

Revision History

Revision No.	Date	Summary of Change(s)	Changed by

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Appendix 1: Guiding Principles

Guiding Principles (led by AM Policy Champion)

Asset Management practices will be aligned with best practices in asset management which incorporates the important principle of balancing risk, cost and performance. The availability and sources of funding affect the level of asset management performance that can be achieved and the risks associated with service provision.

The following key principles will guide the Region as it aims to achieve its asset management vision:

Service Focused: Plan and manage the performance of assets to consistently meet service levels expected by customers and other stakeholders.

- Ensure continued provision of core public services for which the Region has taken on the responsibility to deliver, as well as services provided by the broader public sector, such as healthcare and education
- Take a long-term view while considering demographic and economic trends in the region.
- Make evidence based and transparent investment decisions, and, subject to any restrictions or prohibitions under an Act or otherwise by law on the collection, use or disclosure of information,
 - Make investment decisions respecting infrastructure on the basis of information that is either publicly available or is made available to the public, and
 - Share information with implications for infrastructure planning between the Government and broader public sector entities, and factor this information into investment decisions respecting infrastructure.
- Promote community benefits, being the supplementary social and economic benefits arising from an infrastructure project that are intended to improve the well-being of a community affected by the project, such as local (Ontario) job creation and training opportunities (including for apprentices, within the meaning of section 9 of the Infrastructure for Jobs and Prosperity Act, 2015), improvement of public space within the community, and promoting accessibility for persons with disabilities.
- Consider, where relevant and appropriate, the principles and content of non-binding provincial or municipal plans and strategies established under an Act or otherwise, in planning and making decisions surrounding the infrastructure that supports them.

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Value-Based and Affordable: Identify the best combination of investments that deliver the greatest benefit while respecting funding, resource, and timing constraints including customers' willingness and ability to pay.

- Take into account any applicable fiscal plans or budgets, such as those released under the Fiscal Transparency and Accountability Act, 2004 or adopted under Part VII of the Municipal Act, 2001.
- Promote economic competitiveness, productivity, job creation, and training opportunities.
- Create opportunities to make use of innovative technologies, services, and practices, particularly where doing so would utilize technology, techniques, and practices developed in Ontario.

Risk-Based: Make more informed and better asset management decisions to address existing or potential risks to Regional objectives while understanding the likely outcomes and results of the actions.

- Identify infrastructure priorities while considering the potential risks to the community from asset failures and the resulting service interruptions, which will drive investment decisions.
- Ensure that the identification, evaluation and prioritization of the effects of uncertainty is collaborative, transparent and understood by all stakeholders.
- Minimize the impact of infrastructure on the environment by respecting and helping maintain ecological and biological diversity, augmenting resilience to the effects of climate change, and endeavouring to make use of acceptable recycled aggregates.
- Where possible, invest in green technologies to improve economic and social impacts.
- Protect the health and safety of workers involved in the construction and maintenance of infrastructure assets.

Subject: Insurance and Risk Management Services Contract Extension for November 1, 2019 – November 1, 2020

Report to: Corporate Services Committee

Report date: Wednesday, April 17, 2019

Recommendations

1. That Staff **BE AUTHORIZED** to exercise the option in favour of The Regional Municipality of Niagara (“Niagara Region”) to extend the insurance and risk management services contract with Jardine Lloyd Thompson Canada Inc. (“JLT”) on the same terms and conditions for an additional term of one year for the 2019-2020 policy term based upon an estimated annual cost of \$915,426 (including 8% PST) subject to renewal premium increases due to additional insured property and fleet values.

Key Facts

- The purpose of this report is to seek Council’s approval to extend the insurance and risk management services contract with JLT for the upcoming policy renewal period from November 1, 2019 to November 1, 2020.
- In July 2017, Niagara Region competitively procured the insurance and risk management services by issuing a Request for Proposal (“RFP”) which included Niagara Regional Housing (“NRH”) and Niagara Regional Police (“NRP”).
- On October 31, 2017, Council awarded the RFP to JLT at an annual cost of \$790,838.80 (including 8% PST) for a two year period with an option in favour of Niagara Region to extend the contract on the same terms and conditions for an additional term of up to one year.
- In November 2018, Niagara Region entered into year two of the contract with JLT for the same rates subject to renewal premium increases due to additional insured property and fleet values as well as a mandatory surcharge on recycling facilities.
- In contemplation of a contract extension in year three, Staff reached out to JLT to provide a report outlining any municipal market concerns as well as JLT’s estimated rates for the November 1, 2019 to November 1, 2020 policy renewal.
- JLT provided Niagara Region with an estimated overall premium percentage change of 4.75% over last year’s premium (subject to any increase in property and fleet values).

Financial Considerations

The current cost of insurance premiums for Niagara Region (including NRH and NRP) is approximately \$813,227 (inclusive of 1.76% non-refundable HST) and is included in the

approved Legal and Court Services 2019 operating budget. The contract for year two runs from November 1, 2018 to November 1, 2019.

The renewal option for year three which will run from November 1, 2019 to November 1, 2020 is estimated at \$874,507 (inclusive of 1.76% non-refundable HST). This option includes an increase in cyber premium of \$22,400 to increase the Niagara Region's cyber coverage from \$2,000,000 to \$5,000,000 which was approved by Council as part of 2019 budget approval process.

Subject to Council's approval of this report, given that the term of the contract will expire on November 1, 2019, as a part of the 2019 budgeting process staff also included the estimated cost of coverage for the last two months of 2019. This estimated cost is within the approved budget for 2019. The remaining 10 months of the renewal option will be included in the 2020 operating budget.

Should Council not approve the recommended extension, Staff would be required to go out to market in June 2019 which could result in higher than budgeted premiums.

Analysis

The policy renewal for November 1, 2019 to November 1, 2020, will be third and final year to renew Niagara Region's insurance and risk management services contract with JLT.

On March 28, 2019, at Staff's request, JLT provided Niagara Region with a report outlining current market conditions and the estimated rates for the 2019-2020 insurance program for Niagara Region (which includes NRH and NRP). A copy of the March 28, 2019 report is attached as **Appendix 1**.

JLT's report confirmed a number of items which Staff had identified as being important factors in considering the option to extend with JLT for the 2019-2020 policy period. The following is a summary of the more relevant items considered by Staff and confirmed by JLT:

- Public Sector is in a state of flux and there is increasing pressure to not write business at a loss and municipal business is a class that sustains claims.
- Since the start of 2019, JLT has been made aware of several municipalities who received renewals with increases of 34% or more.
- At this juncture, JLT is seeing increased instability in Lloyds when it comes to writing municipal accounts yet JLT is not seeing any increase in appetite for public sector business from domestic insurers.
- Signs indicate that municipalities can expect that premium reductions, even when faced with competition, are a thing of the past.

- Municipalities can help protect their budgets from premium fluctuations by selecting an insurance program that is stable and use insurers who have exhibited a long term commitment to writing municipal business.
- Strong risk management practices, developing a long-term relationship with insurers, and retaining the appropriate deductible levels will increase in importance.
- The current push by responsible insurers to obtain regular increases of 3 to 10% is to ensure business does not continue to be written at a loss.
- JLT has been writing business with the same insurers for well over 10 years and its municipal program continues to remain strong, with only marginal increases expected for good performing accounts over the next few years.

JLT provided Niagara Region with an estimated overall premium percentage change of 4.75% over last year's premium, subject to any increase required as a result of additional property and fleet values.

In considering the above noted summarized items, Staff's recommendation to renew for the third year with JLT will result in an overall reasonable percentage increase that is within budget and will also allow Staff to focus its efforts on corporate wide risk management practices while continuing to build a knowledge base with JLT to help inform the future competitive procurement process.

It is Staff's intention to bring a report to Council in the Spring of 2020 to seek instructions and direction with respect to the overall competitive procurement process for insurance and risk management services for the November 1, 2020 policy renewal. This will include, but not be limited to, scoring and program rating criteria as well as increased contract term length (3 to 5 years).

Alternatives Reviewed

Staff considered competitive procurement for the November 1, 2019 renewal. However, Staff does not recommend procurement at this time for a number of reasons including the favourable estimated terms provided by JLT, the uncertainty of the Public Sector market, as well as the additional costs and resources required to complete a competitive procurement process with no certainty that any savings would be achieved.

Relationship to Council Strategic Priorities

Exercising the option to extend allows Niagara Region to benefit from additional cost savings while building further knowledge base with the current insurance provider, which aligns with Council's strategic priority of Advancing Organizational Excellence.

Other Pertinent Reports

N/A

Prepared by:

Donna Pasto
Risk Management Program Manager

Recommended by:

Todd Harrison, CPA, CMA
Commissioner/Treasurer
Enterprise Resource Management
Services

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was prepared in consultation with Donna Gibbs, Director Legal and Court Services and reviewed by Adam Niece, Program Financial Specialist.

Appendices

Appendix 1	Forecast and General Market Conditions Report Submitted by JLT Canada dated March 28, 2019	5 to 10
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FORECAST AND GENERAL MARKET CONDITIONS REPORT FOR THE REGIONAL MUNICIPALITY OF NIAGARA

Submitted by JLT Canada

March 28, 2019

MARKET CONDITIONS

There are a variety of factors that impact premium. In addition to an insured's exposures and loss ratio, there are considerations beyond an insured's control that affect premium:

- **Reinsurance*** arrangements: these contracts are impacted by the amount of surplus capital, overall losses (ex. Recycling facilities sustained significant losses globally and reinsurers required increased rates for all such facilities), and profitability within a particular sector.
- **Capital surplus:** investors put money into the insurance market looking for return on their investment and it is the surplus of these funds that allow underwriters to write competitive premiums. The amount of capital injected into the insurance market is tied to profitability. Subject to changes to interest rates, and if markets continues to product results at a loss, we can expect to see investors look for alternate investments with higher returns. The availability of capital is one of the driving factors that determine if we are faced with a soft market (competitive premium, some willingness to write at a loss) or a hard market (focus on insurer profitability through increased premium)
- **Global outlook:** continued catastrophic weather events impact property rates. This is not restricted to municipal business and can be felt even more heavily on commercial accounts.
- **Claims frequency and severity:** particular lines of business with frequent and/or costly claims can cause insurers to implement wide-brush mandatory increases.
- **Legislation:** this is a factor that impacts municipalities more then any other industry. Changes to the application of joint and several liability, environmental legislation, mandatory coverage by municipalities for integrity commissioners, legislated automobile accident benefits coverages, etc. have an impact on rates. The more the insurance industry is expected to fund the cost of injuries/losses to third parties, the more the public sector market space will be impacted as insurers need sufficient funds to pay these long tail claims.

**Reinsurance is insurance that is purchased by an insurance company, in which some part of its own insurance liabilities is passed on ("ceded") to another insurance company. In the classic case, reinsurance allows insurance companies to remain solvent after major claims events, such as major disasters like hurricanes and wildfires. In addition to its basic role in risk management, reinsurance is sometimes used to reduce the ceding company's capital requirements, or for tax mitigation or other purposes. There are two basic methods of reinsurance – Facultative and Treaty.*

Following is a summary of the state of the insurance industry for the general domestic and London markets, as well as what the public sector space is undergoing.

LLOYD'S OF LONDON

At the beginning of November 2018 Lloyd's completed a bruising business planning process that saw an unprecedented number of changes to its syndicates' 2019 plans. We have seen everything from syndicates withdrawing from the market through to pulling out of weaker performing lines of business in order to secure approval. Property, construction, professional indemnity and marine cargo have all in particular been in the firing line. Whilst speculation at this stage and some syndicates will have modest growth signed off, this hard-line remediation stance could reduce overall planned premium levels by up to 10% in 2019.

The focus has now moved from planning to obtaining sufficient capital and ensuring that approved syndicates also have their regulatory capital in place to support their 2019 business plans as part of the so-called 'coming in to line'

exercise. Following loss creep on second half (2H) 2017 catastrophe events, significant loss events in 2H 2018 such as the Californian wildfires, Lloyd's imposed capital loading as part of a wider de-leveraging project, the capital squeeze is on. Sitting behind this de-leveraging will be a Lloyd's concern that some syndicates were being too optimistic with their loss picks on both retrospective and forward looking business. It appears the majority of syndicates have been asked to find additional capital which will of course put further downward pressure on their returns, particularly on those who have to operate next year with a reduced premium income. It follows that by increasing syndicates' cost of capital to ensure an improvement in underwriting profitability will mean underwriters will be forced to stand tough in pushing for premium increases when faced with demanding brokers at their box!

It may also be the case that the market-wide increase in capital is the result of additional pressure faced by Lloyd's from the Prudential Regulation Authority (PRA) and the rating agencies. One of those rating agencies, Fitch, has recently said 'that despite the proactive approach by Lloyd's to confront underperforming syndicates in the market, profitability is expected to remain under pressure in 2019' and 'it does expect the market to respond with a renewed focus on profitable underwriting'.

The above has translated into London markets pushing for rate, cutting line sizes, moving away from writing certain lines of business, and tightening terms and conditions.

DOMESTIC MARKET

The Canadian insurance market remains relatively competitive for well performing accounts and classes of business; however rate reductions are slowing down across almost all lines of business as well as industries. Long-term outlook continues to point to a bottoming out of the market.

As 2017 entered the last months of a record year for Catastrophic losses, increases averaged 10 per cent for loss free accounts, but were as high as 50 per cent for some clients in the Caribbean. The wider industry's response to this year's natural catastrophe losses has been uneven, differing by line of business and geography.

Without taking into account losses or increases in values, domestic property underwriters in H2 of 2018 and H1 of 2019 have been looking for increases of up to 20% on the overall property rate. This is the trend in all types of business – hospitals, commercial operations, real estate, etc. Many domestic insurers are limiting their overall liability and capping the amount payable in the event of a catastrophic loss.

Last year's catastrophe losses have not resulted in a 'knee-jerk' response from the insurance market as of yet, although there is a renewed sense of discipline and determination among underwriters. There has not been a wider move to restrict cover, but insurers are generally looking to impose more disciplined underwriting, an increased reliance on actuarial results, and an increased focus on retentions and limit.

All of the syndicates on your program (QBE, Chaucer and MCI) have had their 2019 business plans approved.

PUBLIC SECTOR MARKET

The Public Sector market is in a state of flux. Although there is still capital in the marketplace there is increasing pressure to not write business at a loss and municipal business is a class that sustains claims. Since the start of 2019, we have been made aware of several municipalities who received renewals with increases of 34% or more.

At this juncture, we are seeing increased instability in Lloyds when it comes to writing municipal accounts yet we are not seeing any increase in appetite for public sector business from domestic insurers. Signs indicated that municipalities can expect that premium reductions, even when faced with competition, are a thing of the past.

Municipalities can help protect their budgets from premium fluctuations by selecting an insurance program that is stable and uses insurers who have exhibited a long term commitment to writing municipal business. Strong risk

management practices, developing a long-term relationship with insurers, and retaining the appropriate deductible levels will continue to increase in importance. The current push by responsible insurer's to obtain regular increases of 3-10% is to ensure business does not continue to be written at a loss. Although difficult to justify increases in the short term, this strategy should reduce the risk of municipalities facing a sudden significant jump in premium, thereby maintaining budget stability. JLT has been writing business with the same insurers for well over 10 years; our municipal program continues to remain strong, with only marginal increases expected for good performing accounts over the next few years.

Gwen Tassone
SVP, Account Executive
JLT Canada
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THE REGIONAL MUNICIPALITY OF NIAGARA

The Region of Niagara has a comprehensive insurance program that effectively transfers a significant portion of the Region's risk. The primary lines most impacted by current market conditions include:

- General Liability, including Administrative Errors and Omissions
- Property, including Boiler and Machinery
- Automobile

Insurers are not able to provide pricing more than 60 days in advance of a renewal; however we did have discussions with insurers and are able to relay the following preliminary indications.

PRELIMINARY RENEWAL ESTIMATES FOR THE REGIONAL MUNICIPALITY OF NIAGARA 2019-2020

General Liability: In 2017 QBE agreed to a 2 year rate guarantee, therefore the 2018 policy renewed at the same rate as expiring. If the Region's loss ratio remains low, the Region may see renewal terms with only a 2-3% increase.

As discussed above, the liability market for municipal business is struggling and insurers are looking for slight increases to help reduce a spike in premiums. However, JLT would advocate for the Region and work with insurers towards a zero percent increase for the 2019 term.

Umbrella Liability: No changes expected at this time. Unless losses deteriorate for underlying policies, the Region can expect premiums to remain the same as expiring terms.

Property, including Boiler & Machinery: Without taking into account losses or increases in values, the JLT program property underwriters have been looking for increases of approximately 3-5% on the overall property rate per \$100. If the Region's loss ratio continues to remain below 40%, we will advocate for 'as is' rates.

As discussed during the Region's 2018 renewal, the rates for recycling facilities recently increased. This is a world-wide issue and Aviva's reinsurers applied this surcharge to all accounts with scheduled recycling facilities due to the increasing number of losses that have taken place globally.

Automobile: There was a program wide automobile rate increase in 2018 of 5% due to the increased cost of claims, which is the result of costs for both vehicle repairs and medical care continuing to increase. The Region's auto policy loss ratio was approximately 66% in 2018. Insurers typically apply increases to accounts with loss ratios in excess of 64%. The Region employs a number of effective risk management practices therefore we were able to negotiate the typical 10% increase down to 3% in 2018. If the loss ratio for this line of business remains above 40%, the Region may see up to a 10% increase. Despite the typical increases noted above, we will negotiate with insurers to obtain the best possible pricing for 2019.

Crime and Excess Crime: Crime remains to be consistent in pricing despite municipalities being a class of business that faces substantial claims from internal theft. This is an area where internal controls and risk management practices are effective means of keeping pricing stable. Unless losses deteriorate no changes are expected. If insurers do require a program wide increase, which is not expected, we may see an increase of 2-3% at most.

Councilors Accident: No changes anticipated

Environmental Impairment Liability (First Party – NRH): Unless losses deteriorate, no changes in premium are expected.

Cyber: This is a coverage that is evolving and changing at a rapid pace. Although it is not recommended to remarket an account every year, this is one policy where obtaining alternate quotes for the Region's 2019 renewal could be advantageous.

The following preliminary estimate is based on what we foresee as the worst case scenario for the Region's 2019-2020 term. JLT would negotiate with insurers to provide the Region with the best possible terms when the renewal process begins.

Policy	2017-2018	2018-2019	Preliminary Estimate 2019 - 2020
<i>Population</i>	449,098	449,098	449,098
General Liability Premium:	\$ 104,200	\$ 104,200	\$ 109,230
Umbrella Liability Premium:	\$ 28,743	\$ 28,743	\$ 28,743
<i>Blanket Property Limit</i>	\$ 2,301,895,766	\$ 2,415,416,917	\$ 2,415,416,917
Property/Boiler & Machinery Premium:	\$ 349,948	\$ 409,369	\$ 423,855
<i>Automobile - Number of Vehicles</i>	716	738	738
Automobile Premium:	\$ 178,009	\$ 188,571	\$ 207,197
EIL First Party NRH Premium:	\$ 17,500	\$ 16,995	\$ 16,995
Crime Premium:	\$ 10,000	\$ 10,000	\$ 10,000
Excess Crime Premium:	\$ 15,000	\$ 15,000	\$ 15,000
Councilors Accident Premium:	\$ 4,320	\$ 4,320	\$ 4,320
Cyber Premium at \$2M	\$ 25,225	\$ 25,225	\$ 25,225*
Directors & Officers Premium (NEDC):	\$ 7,500	n/a	n/a
TOTAL PREMIUM	\$ 740,445	\$ 802,423	\$ 840,565
OVERALL PERCENTAGE CHANGE		8.4%	4.75%
<i>*Additional premium for increasing Cyber limit from \$2M to \$5M</i>			\$22,400

Subject: Bill 142 – Construction Lien Amendment Act, 2017

Report to: Corporate Services Committee

Report date: Wednesday, April 17, 2019

Recommendations

1. That Regional Council **ENDORSE** the recommendations made by the Association of Municipalities Ontario (AMO) to the Ministry of the Attorney General to consider the following additional changes to the recently amended *Construction Act*:
 - Owners should be provided more than 14 days to publish a notice of non-payment to ensure that due diligence is completed before payment of a proper invoice is required (e.g. 21 business days);
 - The time period between December 24th to January 2nd of each calendar year should be excluded from the calculation of time with respect to Prompt Payment and Adjudication;
 - The date for implementing the Prompt Payment and Adjudication regimes should be postponed from October 1, 2019 to one year following the establishment of the Authorized Nominating Authority (ANA); and
 - That the Ministry create and communicate practice guides, interpretation bulletins, and webinars in alignment with Recommendations 97 & 98 of the Expert Panel's Report to educate owners, contractors, and subcontractors of the new regimes;
2. That the Regional Chair **BE DIRECTED** to send a letter to the Ministry of the Attorney General to consider the recommendations made by AMO respecting the changes to the Construction Act; and
3. That Report CSD 29-2019 **BE CIRCULATED** to the local area municipalities.

Key Facts

- The purpose of this report is to inform Council regarding municipal governments' concerns with recent amendments to the *Construction Act* as a result of Bill 142, and recommend that Niagara Region join municipal organizations in support of the four changes outlined by the AMO.
- Of significant concern is that the necessary processes are not in place with the province, preventing municipal governments from planning appropriately for the October 2019 implementation.

- The Association of Municipal Managers, Clerks and Treasurers of Ontario (AMCTO), Municipal Finance Officers of Ontario (MFOA), and other municipal organizations are supportive of the changes outlined by the AMO.

Financial Considerations

There will be a financial impact for the Region to implement and comply with Bill 142; however, the magnitude of the impact cannot be fully understood until the legislation has been in place for some time.

As a result of Bill 142 amendments to the *Act*, there will be cost implications associated with updating contract language, adapting existing processes, and resources required to address prompt payment, mandatory adjudication, risk mitigation, and general compliance with the amended statute. Budgetary and accounting pressures are a factor as mandated payments related to adjudicated disputes will become due mid-project with short timelines for payment.

Staff will be required to develop processes and procedures to respond to new payment and claims pressures under compressed timelines. Additional ongoing legal and contract administration support will also be required to address an expected increase in contract disputes arising from the mandatory adjudication process. Additionally, depending on the yet to be determined regulations, mandatory surety bonds on public projects may also increase project costs, and potentially reduce the competitive pool of available bidders for certain types of work.

Overall, these potential factors introduce significant corporate financial risk to the organization.

Analysis

Bill 142 made numerous amendments to the *Construction Lien Act* (now titled the *Construction Act*), which affect the Region, its professional consultants, general contractors, subcontractors, and contract administrators. These include:

- Modernization of the construction lien and holdback rules and timelines
- Modernization of claims procedures
- Introduction of a prompt payment regime for all construction projects
- Implementation of adjudication as a new process to speed up dispute resolution

The purpose of the amendments was to ensure promptness and security of payment for suppliers of construction materials and services, and to ensure disputes are resolved efficiently to facilitate cash flows between contractors and subcontractors. The amendments are being implemented in three phases and can be categorized as follows:

(1) Minor housekeeping changes which went into effect December 12, 2017; (2) changes with respect to lien modernization, holdback payment, and surety bonding effective July 1, 2018; and (3) changes with respect to prompt payment and adjudication effective October 1, 2019.

Prompt Payment

Effective October 1, 2019, new legislation with respect to a "Prompt Payment" scheme will be implemented which will have an impact on the Region and the construction industry as a whole.

The Act will require that an owner (i.e. the Region) pay according to a "proper invoice" no later than 28 days after receiving said invoice from the contractor. Should an owner dispute the invoice, or a portion thereof, notice of non-payment must be given no later than 14 days after the invoice receipt date. If only a portion of the invoice is disputed, the owner is still required to pay any undisputed portions of the invoice within the 28 day time frame.

Staff are currently working to rewrite contracts and to define what constitutes a "proper invoice" in its contract language. System and process changes related to document management are also required to accommodate these changes. Considerations are also being made in the event the Region loses adjudications of disputes, as interest will accrue on any amounts that are not paid within the legislated time.

In addition, while the Legislative changes related to prompt payment outlined herein come into effect post contract award, the Region's Procurement department recognizes the need for a proactive and upfront commitment of resources to ensure that all associated templates (RFT, RFP, etc.) and contract documentation are updated to reflect the changes related to prompt payment, mandatory adjudication, risk mitigation, and general compliance with the amended statute. To ensure ongoing adherence to the overarching objectives of fairness and transparency, these changes will be incorporated and effectively communicated to the bidding community from the onset of each procurement process that is undertaken.

Adjudication

Also effective October 1, 2019, the Bill 142 amendments will come into force with respect to interim adjudication for construction disputes.

The Minister of the Attorney General is responsible for designating an entity to act as Authorized Nominating Authority (ANA) for the purposes of developing and overseeing programs for training adjudicators; qualifying adjudicators; establishing and maintaining a registry of adjudicators; and appointing adjudicators.

The party to a contract will have the right to refer disputes to adjudication, although adjudications are mandatory if payment is withheld. These disputes could relate to valuation of services or materials; payments under the contract, including change orders; disputes subject to Notices of Non-Payment; amounts retained as set-off; payments of holdback; non-payments of holdback; or any other matter to which the parties to the adjudication agree.

The adjudication procedures are set out in the *Act*, and will include a written notice of adjudication; selecting an approved adjudicator; exchange of documents to be relied upon at the adjudication; powers of the adjudicator; on-site inspection of work projects; and retaining of experts to assist the adjudicator. Strict timelines have been put in place (once adjudication is initiated, parties will have four days to agree to an adjudicator or the Authorized Nominating Authority must appoint one within five days; the initiating party then has five days to provide materials in support of its position; and a decision must be rendered by the adjudicator within 30 days of adjudication).

Liens

Liens are no longer attached to municipal property effective October 1, 2019. Under the current legislation, liens are not attached to crown property or municipal highways; however, if someone wishes to lien other properties such as a community centre, they can register the lien on title. With Bill 142, municipal properties are treated the same as crown lands. All liens are to be served by giving it to the Clerk; they are not to be placed on title. Staff will be required to develop processes and procedures to respond to new liens procedures under compressed timelines.

Staff at the Region have initiated a readiness assessment to identify the gaps and to develop a subsequent work plan to be compliant with Bill 142. Council's endorsement for these recommendations made by AMO and the associated risks as articulated in their letter will help ensure the Region's success in complying with the Bill while staff continue the work to be ready for October 1 or any other date the province may establish as a result of AMO recommendations and their endorsement by the Council.

Alternatives Reviewed

N/A

Relationship to Council Strategic Priorities

N/A

Other Pertinent Reports

N/A

Prepared by:

Kirbi Simpson
Project Manager
Enterprise Resource Management
Services

Recommended by:

Todd Harrison, CPA, CMA
Commissioner/Treasurer
Enterprise Resource Management
Services

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was prepared in consultation and reviewed by Helen Chamberlain, Director Financial Management & Planning, Erin Amirault, Associate Director Finance Operations & Systems, Bart Menage, Director Procurement & Strategic Acquisitions, and Donna Gibbs, Director Legal & Court Services

Appendices

Appendix 1 AMO Submission to the Standing Committee on the Legislative Assembly

Appendix 2 AMO Letter to Attorney General

Bill 142, *An Act to Amend the Construction Lien Act, 2017*

Submission to the Standing Committee on the Legislative Assembly

November 1, 2017

AMO, on behalf of our municipal members, advocates for well-considered provincial legislation that enables municipal governments to function for the benefit of our communities and the public interest. Conversely, we work to mitigate unintended consequences of proposed legislation and regulations, identify gaps that need to be addressed, and provide advice to the Province to determine the best implementation.

Bill 142, *An Act to Amend the Construction Lien Act* (2017), is a piece of legislation that exemplifies the positive outcomes of what happens when a proper and thorough consultation takes place. As you know, the construction industry, owners (including municipal governments), contractors, and subcontractors have long argued for reforms to the *Construction Lien Act*, and AMO is encouraged that Bill 142 includes significant improvements to modernize an Act that is over 30 years old.

The Process

AMO appreciates the government for conducting the Expert Panel review of the *Construction Lien Act*, and the commitment and leadership shown by Attorney General Naqvi to get Bill 142 to this stage.

Our written comments will not come as a surprise to the Ministry of the Attorney General or others, as AMO has been actively consulted and involved throughout the four-year process.

Last week, the Attorney General circulated a list of some proposed government motions that have allowed us to narrow the focus on our remarks on Bill 142. We appreciate the Ministry's attempt to strike a balance between all stakeholders, and recognize that some of our concerns may be addressed in these motions. However, it is still important for AMO to highlight issues raised by our members that should be considered by the Committee.

Please note that our general remarks support other municipal governments' individual technical submissions which combined reflect countless hours working through how Bill 142 would affect the operations in their municipalities, and in some cases, have prepared draft alternative language that we hope the Committee will consider.

Areas of Support for Bill 142

AMO has been working closely with the Attorney General's office to identify gaps and unintended consequences of Bill 142. The Ministry is proposing several government motions that would, if passed, address some of AMO's concerns:

- including a transition provision to provide for consistency until the new law comes into effect;
- exempting architects, engineers, and consulting professionals from requiring surety bonds for public projects;

- clarifying that interest for late payments is from the date the invoice was due and payable; and,
- that adjudication may not revive expired liens.

We recommend that the Committee adopt these changes during clause-by-clause consideration.

In addition to these amendments, AMO submits that consideration also be given to our outstanding issues.

Recommended Areas for Refinement

1. Payment should not be made without first receiving a municipal owner's express approval or certification that work was properly completed.

AMO believes in prompt payment and is supportive of a regime that requires payments be made promptly for work that is completed to a standard that an owner has deemed to have been met. We believe that modernizing prompt payment rules is important and that people who have completed work properly should be paid on time.

AMO agrees completely with the Toronto Transit Commission's comments regarding certification, that "requiring payment to be made from the date of a proper invoice instead of certification or owner's approval means there may not be enough time to properly scrutinize an invoice and risks payment for improper or incomplete work. In the US, 20 states allow the trigger event to be either set out in the contract or is expressly certification/approval."¹

We note in the proposed government amendments, Alternative Financing and Procurement (AFP) projects would be allowed "certification of payment prior to the submission of an invoice for AFP projects."² AMO wonders why these same exceptions cannot apply also to municipal projects, given that it provides significant protection to one type of project over another.

Although the government is proposing a motion that provides an owner with the ability to conduct "testing and commissioning" of a project, it does not account for every scenario and this motion, if applied, would only add an additional cost. Without including a certification trigger, the link of prompt payment with a mandatory adjudication regime, means that an owner is not only required to make a payment in 28 days, but adjudication is automatically invoked if not.

This does not give nearly enough time for a municipal government, large or small, to verify that the work has been completed to specifications and to enter into discussions with contractors for any discrepancies that may be identified, which is industry practice.

¹ Toronto Transit Commission. Written Submission on *Bill 142: Construction Lien Act Amendment Act, 2017*, October 25, 2017, pg. 3.

² Email from the Attorney General's Office. "Update on Bill 142: Construction Lien Amendment Act." Received Monday, October 23, 2017.

All municipal governments have a duty to the taxpayer to be diligent in how projects are managed, and to ensure that taxpayer money is only paid for work that is properly performed and meets all of the specifications under the contract. To have the trigger for payment be the receipt of the proper invoice and not certification or other forms of owner's approval lacks the checks and balances necessary to process those payments. It will undoubtedly result in paying for contracts that are not properly completed and increase costs of litigation to resolve those disputes through adjudication.

Therefore, AMO is requesting that the trigger for payment for public projects be testing, commissioning and certification, or alternatively extend the timelines in the prompt payment regime to ensure that public funds are managed properly, and the safety of our projects are maintained for our residents.

2. Before proceeding to combine the lien rights and mandatory adjudication regimes – making Ontario the first jurisdiction in the world to do so – AMO would like the problematic time lags and other practical considerations addressed.

AMO is very concerned about implementing both regimes at the same time. Even if a matter is not resolved to the satisfaction of a contractor or subcontractor, they may bring a lien action during construction. By contrast, an owner does not have any ability to bring an action until the end of the project.

Bill 142 would make Ontario the first jurisdiction in the world to have both regimes (UK has adjudication but no lien rights). Under the prompt payment regime, owners and contractors would not have the same ability to settle a dispute because the timelines are so strict. To make matters more challenging, the government is proposing a motion that the subcontractor would be required to invoke adjudication if the contractor does not pay. These scenarios only drive up project costs and risk delaying construction projects.

We continue to be told that this legislation intends to catch problematic actors, not large owners like municipal governments. As responsible owners, we should be given flexibility to resolve disputes with contractors at far less cost, before being pulled into adjudication.

AMO also submits that the time lags between the "payment date" and the "non-payment notice" for progress payments ought to be extended to 28 days (s. 6.3 (2)), and the "payment date" and the "non-payment notice" for holdback payments should be extended to 60 days (s.27.1). This would better align the payment deadlines, and decrease the risk that contractors would be paid for work that was not properly completed.

Another example is that the extremely short timelines, proposed for adjudication, could result in the owner being taken by surprise in a trial if the contractor has spent time preparing a detailed claim without the owner's knowledge, and then initiates adjudication, with the owner having very little time to prepare a proper response.

These are just some examples that the Committee should address around the prompt payment and adjudication regimes. AMO recommends that the Province explore the implications of enacting both sections, and that stakeholders have the ability to comment on regulations before they are enacted. We have come too far in this process, and with significant alignment amongst stakeholder groups, why not work together to get it right the first time?

3. It is important that municipal governments receive training support and resources to ensure the legislation is properly implemented at the local level, and that they, as owners, are operating in compliance with the law.

AMO encourages the Ministry to find ways to help train municipal staff across Ontario on what has changed should this legislation pass. The size and capacity of municipal governments is equally broad as the value of projects they deliver. For example, about 43% of municipalities have less than six full-time administrative staff to cover statutory duties including a clerk, treasurer, general reception, and perhaps a chief administrator.³ It is highly unlikely that there will be a lawyer on staff.

Conversely, of the 34 Ontario municipalities that have a population over 100,000, their project management and legal staffing budgets will also have to significantly increase because of this legislation, as they, as an example, are the ones doing transit expansion projects.

Regardless of size, Bill 142 will require every municipality to redraft all of their construction contracts, develop new project management procedures, and change processes to ensure faster payment. This will require hiring more legal and project management resources (especially if the timelines do not change), and adding more administrative burden on every municipal clerk who will need to ensure compliance with this legislation, as well as the over 200 other provincial statutes that municipal governments are required to follow.

Given this context, AMO requests that the legislation be delayed in coming into force by one or two years, and echoes the recommendation by the City of Toronto that “there be a Ministry website for construction in Ontario for the publication of all notices under the Act and to provide additional information on individual projects”.

This would be helpful to all parties in the construction pyramid and erase the administrative and cost burden of publications required under the Act. If each project in the Province was assigned a ‘Project Identifier’ number, this would further assist the parties in locating all of the information about a project in one place, on one website.”⁴

³ Ministry of Municipal Affairs, 2016 Financial Information Return, Schedule 80. <https://efis.fma.csc.gov.on.ca/fir/>

⁴ City of Toronto, Oral Remarks on *Bill 142: Construction Lien Act Amendment Act, 2017*, October 25, 2017

Conclusion

AMO believes that Bill 142 has in some ways truly struck a balance between the competing asks of all stakeholders, and should be considered an achievement for industry and owner groups.

That said, we hope that the Committee will carefully consider our remarks and those of our member municipalities. These remarks are intended to ensure the modernization of the *Construction Lien Act* will be as successful as possible by avoiding unintended consequences and mitigating against the potentially costly and burdensome impacts of this legislation.

Sent via email: caroline.mulroney@pc.ola.org

March 7, 2019

The Honourable Caroline Mulroney
Attorney General
McMurtry-Scott Building, 11th Floor
720 Bay Street
Toronto, Ontario M7A 2S9

Dear Attorney General Mulroney:

I would like to outline the ongoing concerns that municipal governments have with the *Construction Act, 2017*, and to reiterate my request to meet with you on this item. Without legislative amendments and support from the Ministry for implementation, we do not believe that the prompt payment and mandatory adjudication regimes will work effectively by the time the legislation is to come into force.

AMO, and our members, have always supported the principle of prompt payment, as evidenced by various municipal governments that already have policies in place that protect workers and suppliers. That is why we have played an active role in modernizing the *Construction Lien Act* since the work on prompt payment began.

While the *Construction Act* has been modernized in many respects, we recognize that the most significant pieces of legislation come into force on October 1, 2019. With that date fast approaching, AMO is asking the Ministry to consider four amendments:

1. Owners should be provided more than 14 days to publish a notice of non-payment to ensure that due diligence is done before payment of a proper invoice is required (e.g. 21 business days);
2. The time period between December 24th to January 2nd of each calendar year should be excluded from the calculation of time with respect to Prompt Payment and Adjudication, similar to the recently proposed federal legislation;
3. The date for implementing the Prompt Payment and Adjudication regimes should be postponed from October 1, 2019, to 1-year post-establishment of the Authorized Nominating Authority (ANA); and
4. That the Ministry create and communicate practice guides, interpretation bulletins, and webinars in alignment with Recommendations 97 & 98 of the [Expert Panel's Report](#) to educate owners, contractors, and subcontractors on the new regimes.

The proposed 28-day timeline for owners to pay contractors on the receipt of a “proper invoice” does not provide enough time for municipal staff to inspect and certify whether the work has been completed properly. Municipal governments require the ability to certify work before payment is remitted to protect our property taxpayer dollars. This Act essentially prohibits certification before payment, which is problematic and should be reconsidered. Otherwise, the Act leaves municipal taxpayers vulnerable to increasing construction project costs as well as legal fees.

Further, most municipal governments are closed for the holidays or maintain a much reduced staffing level during December 24th to January 2nd. It is important that municipalities are not forced into impossible timelines when those imposed by the legislation are already so tight.

Many details about the Authorized Naming Authority (ANA) are still to be determined. We recognize that the proposed regulations have provided some clarity, and that Expressions of Interest for ANA members were released in January 2019. In order to have the ANA working by October 1st, the Province must develop a certification regime for the adjudicators, ensure that there are sufficient adjudicators to meet demand, and ensure they have all been certified. Only once these details are in place can owners, contractors and subcontractors be educated on how this mechanism will work in practice.

This Act, in its current form, makes Ontario the first jurisdiction in the world to have prompt payment and adjudication regimes run simultaneously. We all need to get it right, and owners are willing to do their part to get ready. To achieve this we strongly encourage the Ministry to create practice guides, interpretative bulletins, and webinars to communicate how to prepare for these regimes prior to coming into force.

One consideration the Ministry should explore is creating a centralized web database hosted for all construction in the province for notices and additional project information. A website commissioned by the Province could have cost-recovery fees and be more affordable than the current proposed vehicle.

I appreciate your thoughtful consideration of these issues, and look forward to meeting to discuss how we can make the *Construction Act* a success for all of Ontario. The Ministry can reach out to AMO staff to clarify any details needed.

Sincerely,



Jamie McGarvey
AMO President
Mayor, Town of Parry Sound

cc: The Honourable Steve Clark, Minister of Municipal Affairs and Housing

Minute Item No. 6.2

PDS 17-2019

Niagara Housing Statement: Affordable Housing Data

That Report PDS 17-2019, dated April 17, 2019, respecting Niagara Housing Statement: Affordable Housing Data, **BE RECEIVED** for information and **BE CIRCULATED** to the Local Area Municipalities.

Minute Item 5.1

PDS 14-2019

Combined Sewer Overflow (CSO) Control and Wet Weather Management (WWM) Program - 2019 Funding Recommendations

That Report PDS 14-2019, dated April 17, 2019, respecting Combined Sewer Overflow (CSO) Control and Wet Weather Management (WWM) Program – 2019 Funding Recommendations, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the 2019 Local Area Municipal projects under the Combined Sewer Overflow (CSO) Control / Wet Weather Management (WWM) Cost Sharing Program, as identified in Appendix 1 of Report PDS 14-2019, **BE APPROVED** in the amount of \$3,944,230;
2. That Regional staff **PREPARE AND EXECUTE** the respective partnership funding agreements with the Local Area Municipalities for qualifying projects to reflect the terms and conditions set out in Appendix 2 and Appendix 3 of Report PDS 14-2019; and
3. That information respecting Regional funding support, as outlined in Appendix 1 of PDS 14-2019, **BE PROVIDED** to the Local Area Municipalities for information.

Minute Item 5.2

PDS 8-2019

Comments on the Province of Ontario's Draft Environment Plan

That Report PDS 8-2019, dated April 17, 2019, respecting Comments on the Province of Ontario's Draft Environment Plan, **BE RECEIVED** for information.

Minute Item 6.1

ED 4-2019

Q1 Economic Development Quarterly Update Report

That Report ED 4-2019, dated April 17, 2019, respecting Q1 Economic Development Quarterly Update Report, **BE RECEIVED** for information.

Minute Item 7.3

Roundtable/Forum for Cannabis and Greenhouse Industry

That staff **BE DIRECTED** to prepare a proposal and budget for a facilitated Regional roundtable/forum to discuss regulations, policies and enforcement pertaining to the cannabis production and greenhouse industry which would include Ministry of Municipal Affairs, Ministry of Health, Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) and Local Area Municipalities.

**THE REGIONAL MUNICIPALITY OF NIAGARA
PLANNING & ECONOMIC DEVELOPMENT COMMITTEE
MINUTES**

**PEDC 4-2019
Wednesday, April 17, 2019
Council Chamber
Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON**

Committee: Bradley (Regional Chair), Butters, Campion, Darte (Committee Vice-Chair), Easton, Greenwood, Heit, Huson (Committee Chair), Junkin, Redekop, Rigby, Ugulini, Witteveen

Absent/Regrets: Bellows, Bylsma, Diodati, Foster, Sendzik, Zalepa

Other Councillors: Ip

Staff: E. Acs, Manager, Community Planning, I. Banach, Manager, Long Range Planning, C. Cousins, Director, Homelessness and Community Engagement, D. Giles, Director, Community & Long Range Planning, J. Gilston, Legislative Coordinator, A. Jugley, Commissioner, Community Services, V. Kuhns, Acting Director, Economic Development, P. Lambert, Director, Infrastructure Planning & Development Engineering, D. Morreale, Director, Development Approvals, A.-M. Norio, Regional Clerk, J. Sinclair, Homelessness Action Plan Advisor, I. Stetic, Water and Wastewater Development Planning Project Manager, A. Tikky, Planner, Planning and Development Services, R. Tripp, Acting Chief Administrative Officer, J. Whyte, Development Industry Consultant

1. CALL TO ORDER

Committee Vice-Chair Darte called the meeting to order at 1:26 p.m.

2. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

3. PRESENTATIONS

3.1 Niagara Housing Statement: Affordable Housing Data (Agenda Item 6.2)

Paul Smetanin, President/CEO, Canadian Centre for Economic Analysis, provided information respecting Niagara Housing Statement: Affordable Housing Data. Topics of the presentation included:

- Objectives
- Households and Housing (2016)
- Core Housing Need (2016)
- Core Housing Need and Affordability (2016)
- Key Takeaways

There being no objection, Report PDS 17-2019 (Agenda Item 6.2) was considered at this time.

At this point of the meeting, Councillor Huson assumed the Chair.

6. CONSENT ITEMS FOR INFORMATION

6.2 PDS 17-2019

Niagara Housing Statement: Affordable Housing Data

Moved by Councillor Butters

Seconded by Councillor Easton

That Report PDS 17-2019, dated April 17, 2019, respecting Niagara Housing Statement: Affordable Housing Data, **BE RECEIVED** for information and **BE CIRCULATED** to the Local Area Municipalities.

Carried

4. DELEGATIONS

There were no delegations.

5. ITEMS FOR CONSIDERATION

5.1 PDS 14-2019

Combined Sewer Overflow (CSO) Control and Wet Weather Management (WWM) Program - 2019 Funding Recommendations

Ilija Stetic, Water and Wastewater Development Planning Project Manager, provided information respecting Combined Sewer Overflow (CSO) Control and Wet Weather Management (WWM) Program - 2019 Funding Recommendations. Topics of the presentation included:

- Wet Weather Management/CSO Program
- Defining the Problem
- CSO Control and WWM Policy
- Types of Projects
- Wet Weather Management Committee
- 2019 Recommended Projects

Moved by Councillor Ugulini
Seconded by Councillor Darté

That Report PDS 14-2019, dated April 17, 2019, respecting Combined Sewer Overflow (CSO) Control and Wet Weather Management (WWM) Program – 2019 Funding Recommendations, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That the 2019 Local Area Municipal projects under the Combined Sewer Overflow (CSO) Control / Wet Weather Management (WWM) Cost Sharing Program, as identified in Appendix 1 of Report PDS 14-2019, **BE APPROVED** in the amount of \$3,944,230;
2. That Regional staff **PREPARE AND EXECUTE** the respective partnership funding agreements with the Local Area Municipalities for qualifying projects to reflect the terms and conditions set out in Appendix 2 and Appendix 3 of Report PDS 14-2019; and
3. That information respecting Regional funding support, as outlined in Appendix 1 of PDS 14-2019, **BE PROVIDED** to the Local Area Municipalities for information.

Carried

Councillor Information Request(s):

Provide information respecting the responsibilities of Public Works Department and Planning and Development Services to manage and operate the Combined Sewer Overflow (CSO) Control and Wet Weather Management (WWM) Program. Councillor Redekop.

5.2 PDS 8-2019

Comments on the Province of Ontario's Draft Environment Plan

Moved by Councillor Greenwood
Seconded by Councillor Witteveen

That Report PDS 8-2019, dated April 17, 2019, respecting Comments on the Province of Ontario's Draft Environment Plan, **BE RECEIVED** for information.

Carried

6. **CONSENT ITEMS FOR INFORMATION**

6.1 ED 4-2019

Q1 Economic Development Quarterly Update Report

Moved by Councillor Rigby
Seconded by Councillor Witteveen

That Report ED 4-2019, dated April 17, 2019, respecting Q1 Economic Development Quarterly Update Report, **BE RECEIVED** for information.

Carried

6.3 PDS 18-2019

Niagara Investment in Culture 2019 Funding Recipients

Committee Chair Huson advised that this item was removed from the agenda and included on the Council Weekly Correspondence Distribution circulated on Friday, April 12, 2019.

7. **OTHER BUSINESS**

7.1 Grants and Incentives Programs

Committee members requested clarification regarding the Region's grants and incentives programs and the qualifying criteria for the Region's support of local area municipal Community Improvement Plans (CIPs).

Councillor Redekop advised he would bring forward a motion on this matter respecting the Smarter Niagara Investment Program at the Regional Council meeting being held on April 25, 2019.

Councillor Information Request(s):

Provide Niagara Region's qualifications for supporting local area municipal Community Improvement Plans. Councillor Heit.

7.2 Affordable Housing

Councillor Witteveen raised concerns with affordable housing in the region and noted alternative means to providing housing, such as establishing space for modular homes, which should be considered.

At this point of the meeting, Councillor Darte assumed the Chair.

7.3 Roundtable/Forum for Cannabis and Greenhouse Industry

Moved by Councillor Huson

Seconded by Councillor Butters

1. That staff **BE DIRECTED** to prepare a proposal and budget for a facilitated Regional roundtable/forum to discuss regulations, policies and enforcement pertaining to the cannabis production and greenhouse industry which would include Ministry of Municipal Affairs, Ministry of Health, Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) and Local Area Municipalities; and
2. That staff **BE DIRECTED** to prepare a report for the Planning and Economic Development Committee being held on May 8, 2019 that outlines the financial implications of tax related grants under Community Improvement Plans (CIPs) and the Regional grant and incentive programs.

After debate on the motion, Councillor Huson withdrew Clause 2.

The Committee Vice-Chair called the vote on the motion as follows:

That staff **BE DIRECTED** to prepare a proposal and budget for a facilitated Regional roundtable/forum to discuss regulations, policies and enforcement pertaining to the cannabis production and greenhouse industry which would include Ministry of Municipal Affairs, Ministry of Health, Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) and Local Area Municipalities.

Carried

8. CLOSED SESSION

There were no closed session items.

9. NEXT MEETING

The next meeting will be held on Wednesday, May 8, 2019, at 1:00 p.m. in the Council Chambers, Regional Headquarters.

10. ADJOURNMENT

There being no further business, the meeting adjourned at 3:49 p.m.

Councillor Huson
Committee Chair

Jonathan Gilston
Legislative Coordinator

Ann-Marie Norio
Regional Clerk



Database of Regional Demographics, Housing and Core Need

April 17th 2019

**CANADIAN CENTRE FOR
ECONOMIC ANALYSIS**

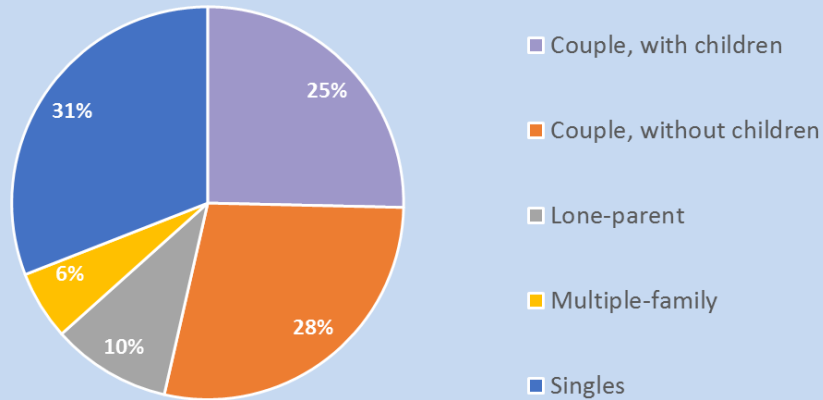
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Introduction – Objectives

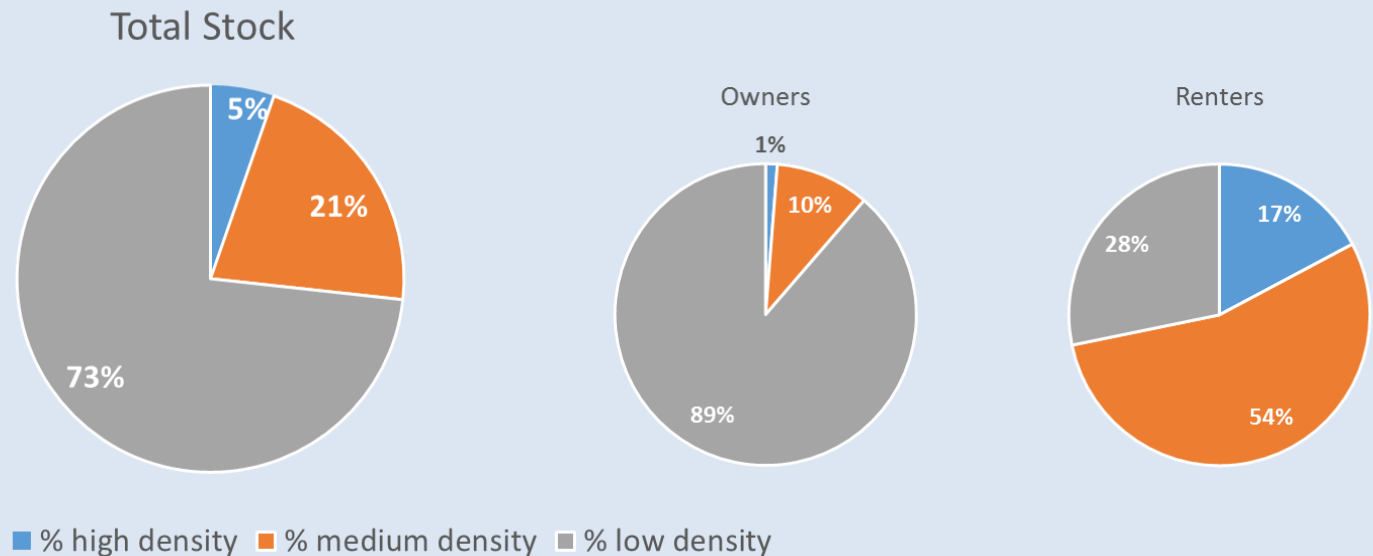
- Objective: Provision of a well-curated, historical and forward-looking database for all Niagara municipalities:
 - Detailed geographical mapping of demographic, housing, income trends
 - Key housing need metrics at the municipal level by cuts such as tenure, age of household maintainer, income decile and household type
 - Analyses of key sub-groups, including older adult, low-income, aboriginal identity, immigrant, and homeless populations
- Forward looking data is in alignment with targets generated by the Growth Plan and through the Region's municipal comprehensive review.
- Results:
 - Reviewed with local area municipalities, confirming important housing challenges
 - All local municipalities have the same database, made available through Excel spreadsheets
 - Database now creates the basis for analyzing policy and planning scenarios

Niagara Region – Households and Housing (2016)

Households



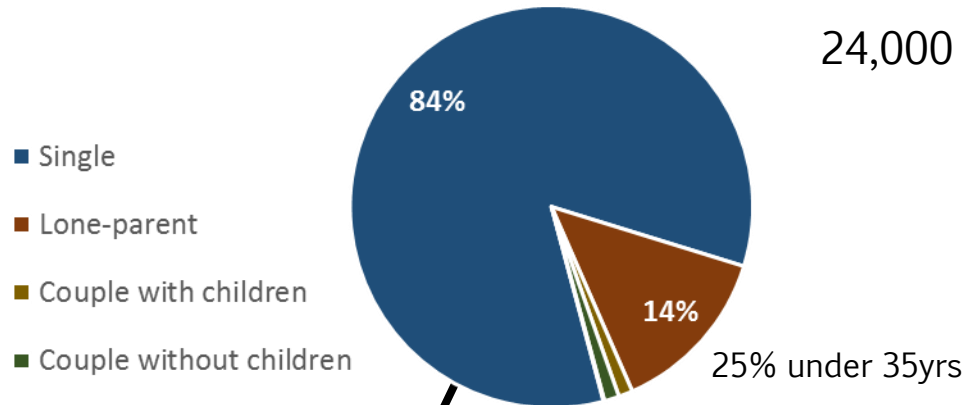
Housing



Niagara Region – Core Housing Need (2016)

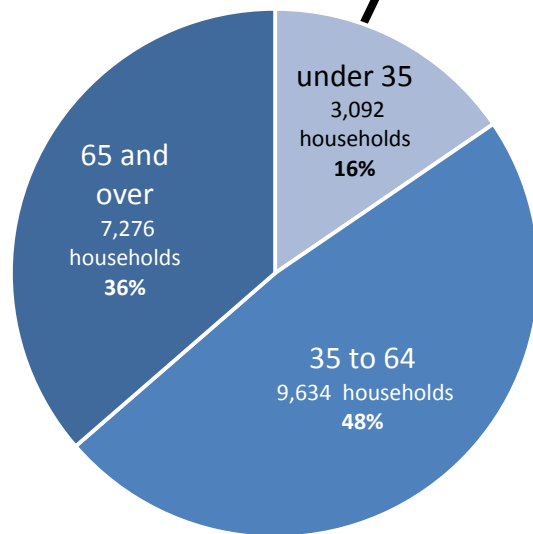
Households in Core Housing Need

24,000 households



Core Housing Need Household Counts	
Type	Households
Single	20,002
Lone-parent	3,254
Couple with children	271
Couple without children	286
Multiple-family	17

Single-Person Households



Core housing need defined by CMHC as:

- At least one condition of unaffordable, unsuitable or inadequate is met and
- No alternative market housing is available given the household's income

Niagara Region – Core Housing Need and Affordability (2016)

Core Housing Need				
Age Range	All Households		Renters	
15 to 34	4,031	16%	2,909	24%
35 to 64	12,201	12%	6,591	27%
65+	7,598	13%	4,101	36%

Spending over 30%				
Age Range	All households		Renters	
15 to 34	8,685	35%	6,098	50%
35 to 64	23,767	23%	10,300	43%
65+	13,020	22%	6,225	54%

- Almost half of all renter households in Niagara are spending over 30% of income on shelter, compared to 16% of owner households.
- Household types most prone to core housing need are single-person households and lone-parent households, whether they rent or own.
 - **20,000 single-person households** are in core housing need
 - **3,250 lone-parent households** are in core housing need

Niagara Region – Core Housing Need and Affordability (2016)

Affordability Thresholds by Income Decile			
Decile	Income	Max Affordable Monthly Housing Cost	Households in Core Need
1st	Less than \$19,400	\$485	8,557
2nd	\$19,400 to \$29,500	\$737	7,545
3rd	\$29,500 to \$39,800	\$995	6,295
4th	\$39,800 to \$52,700	\$1,317	1,429
5th	\$52,700 to \$68,400	\$1,710	4
6th	\$68,400 to \$84,300	\$2,107	-

- In total, 23,830 households with incomes lower than \$68,400 need affordable shelter options

Housing costs include all expenses required to make a shelter operational

- E.g. Electricity, fuels, water & other municipal services, monthly mortgage payments, property taxes, condominium fees, and rent.

Key Takeaways – Niagara Region

- The Region's housing stock is primarily low-density.
 - Single detached homes are most common, followed by low-rise apartments and row houses.
 - 26% of the stock is medium- or high-density; 71% of the renter population lives in these types of units.
- 24,000 households in Niagara Region are in core housing need.
 - Renters are twice as likely as owner households to spend over 30% of income on shelter, be in core housing need, live in an unsuitable dwelling and live in an unaffordable dwelling.
 - Affordability is the main challenge in the Region, as rates of unsuitability and inadequacy are low overall.
- Similar rates of core housing need exist across most ages of household maintainers
 - Rates are slightly higher for households with a maintainer younger than 35 or older than 84.
- Core housing need predominantly affects non-census and lone-parent households.
 - Non-census households comprise the vast majority of households in core housing need, followed by lone-parent households.
 - Lone-parent households have the highest likelihood of being low income (LIM-AT) relative to other household types.

Subject: Niagara Housing Statement: Affordable Housing Data

Report to: Planning and Economic Development Committee

Report date: Wednesday, April 17, 2019

Recommendations

1. That Report PDS 17-2019 **BE RECEIVED** for information; and
2. That a copy of Report PDS 17-2019 **BE CIRCULATED** to the Local Area Municipalities.

Key Facts

- The purpose of this report is to inform Council of the development of a Niagara Housing Statement database to inform the concurrent studies being undertaken by the Planning and Development Services Department and the Community Services Department. Specifically, the comprehensive review of the Niagara Region's Housing and Homelessness Action Plan and the preparation of a regional housing strategy to inform the policies of the Regional Official Plan.
- An inter-departmental Steering Committee was formed in 2018 to align the concurrent efforts across the Corporation to address issues of housing supply and affordability. The Steering Committee determined that there is a need for a single source of housing-related data that clearly delineates housing need within Niagara Region.
- The Canadian Centre for Economic Analysis (CANCEA) was awarded the project and has prepared a comprehensive database that includes key housing metrics, and detailed demographic and housing trends for Niagara by region and municipality.
- A series of one-on-one consultation meetings was held in March 2019 between local municipal planning staff, Regional staff, and the CANCEA Project Team to discuss the database and emerging trends. Feedback received during these sessions was overwhelmingly supportive of the project deliverables, and indicated an urgent need for this data to be shared in order to inform municipal-level housing studies and related initiatives.
- Following this Committee meeting, Regional staff will distribute the database to local municipal staff, and organise a one-day working session to review the data, identify local and regional trends and identify scenarios that will inform the preparation and implementation of local and regional housing policy.

Financial Considerations

The Niagara Housing Statement project was funded through the 2018 Council Approved Operating Budget with contributions from the Planning and Development Services Department, and the Community Services Department. There are no direct financial implications arising from this report.

Analysis

Background

New Regional Official Plan and Housing and Homelessness Action Plan

Section 26 of the *Planning Act* requires municipalities to undertake regular reviews of their Official Plans in order to align and conform to Provincial planning policy and legislation, including the policies of the Provincial Policy Statement (2014), the Growth Plan for the Greater Golden Horseshoe (2017), the Greenbelt Plan (2017), and the Niagara Escarpment Plan (2017).

Through approval of Report PDS 40-2016, Regional Council endorsed the preparation of a new Regional Official Plan in accordance with the *Planning Act*. Subsequently, Report PDS 41-2017 outlined eight (8) background studies necessary for the development of the new Regional Official Plan. In conformity with Section 2.2.6 of the Provincial Growth Plan (2017), this list of studies includes the preparation of a regional housing strategy, that must, among other things: identify a diverse range and mix of housing options and densities to meet the needs of current and future residents; establish targets for affordable ownership and rental housing; identify land use planning and financial planning tools to support these measures; and align with the Niagara Region 10-Year Housing and Homelessness Action Plan (HHAP) as required under the *Housing Services Act*.

The Niagara Region 10-Year HHAP was developed in consultation with local community members, service providers, local area municipalities, and other stakeholders as per the requirements of the *Housing Services Act*. Action plans play a critical function in setting out how Service Managers, such as the Regional Municipality of Niagara, are to address housing and homelessness locally, including: housing affordability, the co-ordination of homelessness and related support services, and the prevention of homelessness and chronic homelessness. The Plan was approved by Niagara Regional Council in 2013, and came into effect on January 1, 2014.

The *Housing Services Act* stipulates that Service Managers must review their plans at least once every five (5) years to reflect changes in policy and/or shifts in local priorities, as well as to ensure consistency with the Policy Statement: Service Manager Housing

and Homelessness Plans (2016). The review process is an opportunity to consider if any substantial changes have taken place in the local context since its initial creation, particularly in relation to local demographic and economic changes.

This is formally reflected in the Policy Statement: Service Manager Housing and Homelessness Plans (2016), which requires Service Managers to complete an assessment of current and future housing needs. The assessment must be used to inform objectives, targets, and achievements within the updated HHAP, including goals related to the provision of a mix and range of housing by non-profit housing corporations, non-profit cooperatives, and the private sector in order to meet the needs of the local community. The action plan must also reflect a coordinated approach with Ontario's land use planning framework, including the Provincial Policy Statement (2014) and the Provincial Growth Plan for the Greater Golden Horseshoe (2017).

Preparation of the Niagara Housing Statement Database

In 2018, staff members from Niagara Regional Housing, Planning and Development Services, Community Services, and ERMS Departments formed an inter-departmental Steering Committee to coordinate concurrent housing studies, as well as to align efforts being undertaken across the Corporation to address housing supply and affordability within the Niagara Region.

The Steering Committee identified that there was no existing source of data either within or outside the organization that could provide an accurate assessment of the current and future demand for ownership, rental, and affordable housing within the Niagara Region. As such, in recognition of the mutual need for this information, the Planning and Development Services Department and the Community Services Departments prepared a joint Request for Proposal (RFP) for the development of a comprehensive database that would inform the policies of the Niagara Region Housing and Homelessness Action Plan and the Regional Official Plan.

In December 2018 the project was awarded to the Canadian Centre for Economic Analysis (CANCEA), an analytics and data organization with over 15 years experience in the provision of demographic, household, employment, land-use and economic analyses for various municipal and provincial government bodies. The database prepared by CANCEA includes detailed demographic and housing trends, both based on historical data, as well as data projections in conformity with those developed for Niagara 2041 Growth Strategy. The database also includes geographical mapping of income levels, demographic and housing characteristics at the sub-municipal levels, key housing need metrics at the municipal level, and analyses of key sub-groups, including older adults, low-income earners, immigrant and homeless populations, and aboriginal identity.

Local Municipal Consultation

Following a presentation by CANCEA to the inter-departmental Steering Committee on March 25, 2019, a series of one-on-one consultation meetings were held on March 26, 2019 and March 27, 2019 between local planning staff from all twelve (12) area municipalities, staff from Planning and Development Services, Community Services, and Niagara Regional Housing, and the CANCEA Project Team

As part of these consultation sessions, each municipality was provided with data specific to their community, as well as a high-level overview of the housing data collected. The contents and capabilities of the prepared database were presented by the Project Team, followed by a facilitated discussion regarding the results of the preliminary data analysis and its potential implications on municipal housing initiatives.

Feedback from local municipal staff was positive, with few corrections or gaps in the data identified. Several local municipalities indicated that they were in the process of undertaking similar types of housing analyses to address the specific needs of their communities, and that receipt of the prepared database would be critical to determining their scope and direction.

Process and Next Steps

Given the overall response to the database and the urgent nature of select municipal studies, Regional staff have determined that it is imperative that the results of the data analysis be presented to the Committee at this time, so that the Niagara Housing Statement database can be shared with local municipalities to work with.

Following the circulation of the dataset, Regional staff will be working with CANCEA's Project Team to arrange and host a training session for local municipal staff. Regional staff also intend to use this session as a means to facilitate further discussion regarding the specific housing needs of local area municipalities, and to develop specific scenarios for a risk and opportunities analysis that can inform the policies and regional targets within the Niagara Region HHAP and the new Regional Official Plan.

Alternatives Reviewed

The inter-departmental Steering Committee discussed various means of utilizing existing data sources to form the basis of the Region's housing policies and objectives. However, due to the incomplete and disjointed nature of the information available, it would compromise the effectiveness of any recommended tools or metrics. The comprehensive database prepared by CANCEA is necessary for staff to develop evidence-based policies that more accurately reflects the Region's housing needs, as well as to provide consistency between Regional and local municipal housing studies and strategies.

Relationship to Council Strategic Priorities

The new Regional Official Plan will assist in implementing Council's Strategic Priority of Labour-Ready Workforce.

Other Pertinent Reports

N/A

Prepared by:

Alexandria Tikky
Planner
Planning and Development Services

Recommended by:

Rino Mostacci
Commissioner
Planning and Development Services

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was reviewed by Doug Giles, MCIP, RPP, Director, Community and Long-Range Planning.

Presentation for PDS 14-2019

CSO Control and Wet Weather
Management Program – 2019 Funding
Recommendations

April 17, 2019

Wet Weather Management/CSO Program

- Transferred from Public Works to Planning & Development in 2018
- Targeted Removal of Inflow & Infiltration from sanitary sewer system throughout the Region
 - Protection of basement flooding
 - Reducing overflows to the environment
 - Capacity to support growth
 - Postpone upgrades/expansion of sanitary sewer system



Defining the Problem

Inflow & Infiltration



The CSO Control & WWM Policy

- Shared funding
- Mitigate the impacts of wet weather
- Joint responsibility between LAMs and the Region
- “Optimal Solution” independent of ownership
- Eliminate, reduce, contain and report

CORPORATE POLICY <small>Policy number is applied by WWS following policy approval</small>	
SECTION: Public Works – Water and Wastewater	NAME OF POLICY: Combined Sewer Overflow Control & Wet Weather Management Policy
<small>Page 1 of 4</small>	
DEVELOPED BY: Public Works Department	
APPROVED BY: Regional Council	
APPROVAL DATE: June 1, 2007	
EFFECTIVE DATE: June 1, 2007	
REVISION DATE: September 2, 2014	
HISTORY OF THIS POLICY Implemented in June 2007, revised Oct 2008	

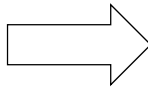
Wet Weather Management Program



293 Approved Applications from 2007-2018



\$ 56 M in total Regional funding approved



\$ 18 M remaining for active project to be completed

Types of Projects

- Sewer Separation
- Studies
- Private Side Source Control
- Conveyance and Flow Control
- Repair, Rehabilitation & Replacement



Wet Weather Management Committee



Bob Leroux



Mark Green



Jeff Vyse



Gillian Harris



Kent Schachowkoj



Jason Marr



Tim Marotta



Sean Dunsmore



Jim Huppen



Ilija Stetic



Stephen McGean



Marvin Ingebrigtsen



2019 Recommended Projects

Municipality	Project Title	Region % Share	Funding Requested	Funding Approved
Fort Erie	Bertie Place Watermain Replacement (BRPL19) ¹	30%	\$ 73,500	\$ 73,500
	Highland Ave Sanitary Sewer Replacement & Road Reconstruction	30%	\$ 123,300	\$ 123,300
	Nigh Road Sewershed Trenchless Rehabilitation (NSST19)	30%	\$ 120,000	\$ 120,000
	Thunder Bay Trenchless Sewer Rehabilitation (TBTR19)	30%	\$ 48,000	\$ 48,000
	Lakeside Road Watermain Replacement and Road Reconstruction ¹	30%	\$ 320,700	\$ 320,700
	Sanitary Sewer Flow Monitoring (FLOMON)	60%	\$ 45,000	\$ 45,000
Lincoln	Jordan Station/Campden Sump Pump Disconnect - Phase 1	60%	\$ 360,000	\$ 360,000
	Jordan and Campden Downspout Disconnect Phase 2	60%	\$ 8,100	\$ 8,100
	Twenty-First Street Maintenance Hole Replacement	30%	\$ 29,400	\$ 29,400
Niagara Falls	Fifth & Sixth Avenue Sewer Separation	40%	\$ 153,320	\$ 153,320
	Fourth Avenue Sewer Separation	40%	\$ 179,640	\$ 179,640
	Ross Street Sewer Separation	40%	\$ 9,840	\$ 9,840
	St. James Avenue Sewer Separation	40%	\$ 155,400	\$ 155,400
	Third Avenue Sewer Separation	40%	\$ 65,040	\$ 65,040
	South Niagara Falls Infiltration and Inflow Study - Phase 2	50%	\$ 100,000	\$ 100,000
Niagara-on-the-Lake	CSO Flow Monitoring (Post Repair)-(Phase 1-King-Charlotte Area)	60%	\$ 30,000	\$ 30,000
	CSO Reduction Project - Old Town (Phase 2 - Front & Ricardo Streets)	50%	\$ 75,000	\$ 75,000
	Old Town CSO I/I Study (Phase 3 - Dorchester St. South Area)	30%	\$ 45,000	\$ 45,000
Pelham	Design - Church Street Upgrade	30%	\$ 15,000	\$ 15,000
St. Catharines	Hampstead Place Sewer Separation	50%	\$ 104,000	\$ 104,000
	Yale Crescent	40%	\$ 99,200	\$ 99,200
	Else Street Sewer Separation	50%	\$ 1,040,000	\$ 1,040,000
Thorold	Sanitary Sewer Spot Repair Project	30%	\$ 10,590	\$ 10,590
Welland	Edgar Elgin (SCF) Sewer Separation	40%	\$ 100,000	\$ 100,000
	West Main Area Inf. Improv. WW	40%	\$ 180,000	\$ 180,000
	West Main Area Inf. Improv. Storm Water	40%	\$ 120,000	\$ 120,000
	Catchbasin Separation Work	40%	\$ 74,200	\$ 74,200
	Lincoln & Coventry Flow Monitoring	60%	\$ 45,000	\$ 45,000
	CSO & Sewer System Flow Level Monitoring	60%	\$ 60,000	\$ 60,000
	Extraneous Sewer Flow Study	50%	\$ 50,000	\$ 50,000
	Evelyn Ditch Flow Monitoring	60%	\$ 90,000	\$ 90,000
	Municipal I/I Collective Research Project for the Reduction of I/I	100%	\$ 15,000	\$ 15,000
Total			\$ 3,944,230	\$ 3,944,230

Wet Weather Management Program

Questions ?

Ilija Stetic, W&WW Development Project Manager

Subject: Combined Sewer Overflow (CSO) Control and Wet Weather Management (WWM) Program – 2019 Funding Recommendations

Report to: Planning and Economic Development Committee

Report date: Wednesday, April 17, 2019

Recommendations

1. That the 2019 Local Area Municipal projects under the Combined Sewer Overflow (CSO) Control / Wet Weather Management (WWM) Cost Sharing Program, as identified in Appendix 1 of Report PDS 14-2019, **BE APPROVED** in the amount of \$3,944,230;
2. That Regional staff **PREPARE AND EXECUTE** the respective partnership funding agreements with the Local Area Municipalities for qualifying projects to reflect the terms and conditions set out in Appendix 2 and Appendix 3 of Report PDS 14-2019; and
3. That information respecting Regional funding support, as outlined in Appendix 1 of PDS 14-2019, **BE PROVIDED** to the Local Area Municipalities for information.

Key Facts

- The purpose of this report is to provide background information to support the approval of the 2019 Local Area Municipal projects under the CSO Control / WWM Cost Sharing Program.
- The Combined Sewer Overflow (CSO) Control/Wet Weather Management (WWM) Program has been in place since 2007 and is intended to facilitate shared funding with the Local Area Municipalities (LAMs) to help mitigate the impacts of wet weather events on the Region-wide sanitary system and the environment. As a result, the Region benefits from this program by gaining capacity, which in return, could be used for growth without oversizing Regional infrastructure. The CSO Control/WWM Program supports Council's Strategic Priorities with a goal to increase capacity in the wastewater systems by mitigating impacts of and reducing inflow and infiltration (I/I).
- Representatives of the CSO/WWM Work Group developed administrative procedures to support this Program and to rank project submissions by the LAMs in accordance with the guiding principles. In 2018, the group added a weighted approach of a growth component into the existing evaluation matrix.

- The Region supports this approach and has included funding annually in its budget. For 2019, an amount of \$4,000,000 was budgeted in the Region's Wastewater Operating Budget.
- The total of eligible projects submitted by the Area Municipalities for 2019 adds up to \$3,944,230.

Financial Considerations

A gross budget of \$4,000,000 has been approved as part of the 2019 Wastewater Operating Budget for the CSO Control/WWM cost share program. Funding for this program is partially provided through the Development Charges – Sewer deferred revenue account (50%).

The recommended eligible projects submitted by the LAMs for 2019 totaled \$3,944,230; therefore, sufficient funds are available to accommodate this request. The total amount included a \$15,000 support contribution to Municipal I/I Collective Research Project for the reduction of I/I. This project is directly aligned with the CSO Control/WWM Program benefiting all LAMs. In support of it, each municipality signed a written consent agreeing that the contribution be taken from the 2019 CSO Control/WWM Funding Program.

The remaining \$55,770 budget will still be available for the rest of 2019 in order to accommodate any unforeseen or not yet approved projects requested by the LAMs. If still unused by year-end, this amount could be returned to the Regional reserves from which the funding originated. The list of recommended eligible projects is presented in Appendix 1.

Based on the preliminary consultations with the LAMs, 25 finished projects are being reviewed for potential closure this year, which could create a net total of \$1,581,961 to be returned to Regional reserves. During the consultations, LAMs suggested the Region review the CSO Control/WWM Policy to explore if possible to provide assistance with municipal offered programs region-wide for disconnection of private side I/I sources. It is an industry known estimation that 50% of all extraneous flows originate from the private sources. Regional staff will review the policy to prepare recommendations after receiving LAM program information and data, and report to Committee and Council at a later date.

In addition to the \$4,000,000 approved in the 2019 Wastewater Operating Budget, there are currently \$23,633,914 of previously approved and active CSO projects at December 31, 2018. Of that amount, \$5,709,612 had been paid to Local Area Municipalities at December 31, 2018.

Analysis

Forty six (46) applications were received from eight (8) municipalities. Fifteen (15) applications either did not align with the CSO Control/WWM Program or were retracted by the applicants and therefore, were not included for the final analysis.

Thirty one (31) applications from eight (8) municipalities were considered for the funding in the amount of \$3,929,230. In addition to, a \$15,000 support contribution to Municipal I/I Collective research project for the reduction of I/I was endorsed by all municipalities. This total requested funding of \$3,944,230 shows a surplus of \$55,770 that will be available for the rest of 2019.

Alternatives Reviewed

No alternatives were considered at this time.

Relationship to Council Strategic Priorities

This report was brought forward by Regional Staff, supported by the CSO/WWM Work Group, and supported by the Public Works Officials as the first priority in establishing a more holistic and strategic approach to the operational challenges in dealing with high flows in the collection system, basement flooding, and overflows to the receiving water bodies.

Other Pertinent Reports

- PWA 116-2008, October 29, 2008 – Combined Sewer Overflow (CSO) Control Policy-Proposed Policy Amendments
- PW 96-2014, September 23, 2014 – Combined Sewer Overflow (CSO) Control Policy Amendments

Prepared by:

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Project Manager
Planning and Economic Development

Recommended by:

Rino Mostacci, MCIP, RPP
Commissioner
Planning and Economic Development

Submitted by:

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Acting Chief Administrative Officer

This report was prepared in consultation with Phill Lambert, P. Eng., Director, Infrastructure Planning & Engineering and Joe Tonellato, P. Eng., Director of Water & Wastewater Services, and reviewed by Dan Ane, Manager, Program Financial Support.

Appendices

Appendix 1	2019 CSO Control/WWM Applications Summary	Page 5
Appendix 2	Terms and Conditions of Funding Agreements	Page 6
Appendix 3	Funding Options	Page 7

Appendix 1: Recommended 2019 CSO Control/WWM Funding Requests

Municipality	Project Title	Region % Share	Funding Requested	Funding Approved
Fort Erie	Bertie Place Watermain Replacement (BRPL19) ¹	30%	\$ 73,500	\$ 73,500
	Highland Ave Sanitary Sewer Replacement & Road Reconstruction	30%	\$ 123,300	\$ 123,300
	Nigh Road Sewershed Trenchless Rehabilitation (NSST19)	30%	\$ 120,000	\$ 120,000
	Thunder Bay Trenchless Sewer Rehabilitation (TBTR19)	30%	\$ 48,000	\$ 48,000
	Lakeside Road Watermain Replacement and Road Reconstruction ¹	30%	\$ 320,700	\$ 320,700
	Sanitary Sewer Flow Monitoring (FLOMON)	60%	\$ 45,000	\$ 45,000
Lincoln	Jordan Station/Campden Sump Pump Disconnect - Phase 1	60%	\$ 360,000	\$ 360,000
	Jordan and Campden Downspout Disconnect Phase 2	60%	\$ 8,100	\$ 8,100
	Twenty-First Street Maintenance Hole Replacement	30%	\$ 29,400	\$ 29,400
Niagara Falls	Fifth & Sixth Avenue Sewer Separation	40%	\$ 153,320	\$ 153,320
	Fourth Avenue Sewer Separation	40%	\$ 179,640	\$ 179,640
	Ross Street Sewer Separation	40%	\$ 9,840	\$ 9,840
	St. James Avenue Sewer Separation	40%	\$ 155,400	\$ 155,400
	Third Avenue Sewer Separation	40%	\$ 65,040	\$ 65,040
	South Niagara Falls Infiltration and Inflow Study - Phase 2	50%	\$ 100,000	\$ 100,000
Niagara-on-the-Lake	CSO Flow Monitoring (Post Repair)-(Phase 1-King-Charlotte Area)	60%	\$ 30,000	\$ 30,000
	CSO Reduction Project - Old Town (Phase 2 - Front & Ricardo Streets)	50%	\$ 75,000	\$ 75,000
	Old Town CSO I/I Study (Phase 3 - Dorchester St. South Area)	30%	\$ 45,000	\$ 45,000
Pelham	Design - Church Street Upgrade	30%	\$ 15,000	\$ 15,000
St. Catharines	Hampstead Place Sewer Separation	50%	\$ 104,000	\$ 104,000
	Yale Crescent	40%	\$ 99,200	\$ 99,200
	Else Street Sewer Separation	50%	\$ 1,040,000	\$ 1,040,000
Thorold	Sanitary Sewer Spot Repair Project	30%	\$ 10,590	\$ 10,590
Welland	Edgar Elgin (SCF) Sewer Separation	40%	\$ 100,000	\$ 100,000
	West Main Area Inf. Improv. WW	40%	\$ 180,000	\$ 180,000
	West Main Area Inf. Improv. Storm Water	40%	\$ 120,000	\$ 120,000
	Catchbasin Separation Work	40%	\$ 74,200	\$ 74,200
	Lincoln & Coventry Flow Monitoring	60%	\$ 45,000	\$ 45,000
	CSO & Sewer System Flow Level Monitoring	60%	\$ 60,000	\$ 60,000
	Extraneous Sewer Flow Study	50%	\$ 50,000	\$ 50,000
	Evelyn Ditch Flow Monitoring	60%	\$ 90,000	\$ 90,000
Municipal I/I Collective Research Project for the Reduction of I/I		100%	\$15,000	\$15,000
Total			\$ 3,944,230	\$ 3,944,230

Note 1: These projects incorporate works on the sanitary sewer side applicable under the CSO/WWM program.

Appendix 2: CSO Control / WWM Policy Funding Conditions

The terms and conditions under which funding will be offered to the successful applications include the following:	
1.	<i>Amount of Funding, Studies</i> - The Region shall contribute 50% of total study costs for the PPCP and I&I studies, and 60% for the Pre and Post Flow monitoring projects provided the Region participates on a committee overseeing the study and the study covers the entire area tributary to the Wastewater Treatment Plant(s) and includes both local and Regional infrastructure.
2.	<i>Amount of Funding, Design & Construction projects</i> – The Region shall contribute defined percentage of the cost based on the Funding Options matrix, provided that; the facility or measure is supported by a recommendation from a current CSO study, life cycle cost comparisons of alternative solutions were undertaken and the Region agrees with the cost comparisons, the Region agrees with the 'best overall solution', and the Region participates on a committee overseeing the design. For multi-year projects, annual project applications are required for each new planning, design, construction or program phase, related to that funding request.
3.	<i>Third Party Funding</i> – The Region's funding shall be net of any third party funding approved for the project. If third party funding is obtained after Regional funding approval, the amount of Regional funding will be adjusted to be net of any third party funding. Payment of the funding to the Area Municipality shall be based on actual expenditures incurred up to the maximum amount approved by Regional Council based on the budget submitted with the application.
4.	<i>Project Lead Studies</i> – Lead by either the Area Municipality or the Region based on a mutual agreement prior to initiation of study.
5.	<i>Project Lead Design & Construction</i> – A project located in the Area Municipal wastewater system shall be managed by the Area Municipality while a project in the Regional wastewater system shall be managed by the Region. On a case-by-case basis the Region may consider managing a project in the local system, if requested by the Area Municipality.
6.	<i>Ownership and Operation of Assets</i> – The ownership and operation of all new and existing assets shall remain the responsibility of the current owner. The Area Municipality, on a case by case basis, may request the Region to operate and maintain an existing or new CSO control facility on behalf of the Area Municipality on a direct charge back basis.
7.	<i>Follow up Flow Monitoring</i> – On a case-by-case basis, the Region may include a condition or approval of funding that requires follow up flow monitoring to assess project's effectiveness.
8.	<i>Expiry of Funding</i> – Funding of a project by the Region may expire if the project is not initiated within one year of approval. Projects must be completed within three years of approval by Regional Council. Where a project is not completed within the three years, written notice must be provided to the Region, in advance of the deadline, and extensions for continued funding may be granted on a case-by-case basis.
9.	<i>Indemnity</i> – The Region, or its directors, officers, employees, agents or consultants will not be held liable as a result of providing funding for any project.
10.	<i>Regional Recognition</i> – The Area Municipality is to ensure that the Region is to be acknowledged in all advertising and publicity related to the project for which funding was provided.
11.	<i>Project Deliverables</i> – The Region shall receive copies of all project deliverables, including, but not limited to, reports, flow monitoring data, hydraulic modelling files, GIS layers/data, and technical memorandums.
12.	<i>Funding Agreement</i> - A letter formalizing the funding in accordance with the Region's CSO Funding Policy will be issued to the Area Municipality for signature and used as the agreement to the terms and conditions of the funding.

Appendix 3: Funding Options

Project Category No.	Project Types include design and/or construction. All projects must be recommended from a Study. All projects exclude internal costs incurred on projects.	100% Funding Amount Priority	Region %	LAM %
1.	Sewer Separation	40%		
Work Examples	Disconnection of road drainage		40	60
	Disconnection of road and private		60	40
	Disconnection of road, previous disconnection of private or opposite		50	50
2.	Studies	15%		
Work Examples	PPCP as per the PPCP Guide		50	50
	I&I and extraneous flow investigation including CCTV/smoke testing ¹		50	50
	Mandatory Flow Monitoring - Pre and Post		60	40
	Investigative work on Municipal/Private side		50	50
	Public Education/Water conservation and efficiency measures		50	50
	Sewer Use By-Law development/update and Municipal Policies		50	50
3.	Source Control - Private Side	20%		
Disconnection of roof leaders - prerequisite for other works on the private side.				
Work Examples	Disconnection of roof leaders		60	40
	Disconnection of weeping tiles from sanitary including applicable works		60	40
	Private property disconnection of sump pumps		60	40
	Backflow preventor installation on sanitary		40	60
4.	Conveyance and Flow control/storage	15%		
Work Examples	Real time control for detention		60	40
	In-line flow controllers design & construction (e.g. weirs)		60	40
	Off-line conveyance and pumping design and construction		60	40
	In-line / Off-line Storage		40	60
5.	Repair/ Rehabilitation/ Replacement of Sewers (estimated ≥50% flow reduction during WW events)	10%		
Work Examples	Repair of sanitary/ manholes - gel sealing, spot repairs		30	70
	Spot repair lining		30	70
	Full length liner		30	70

Note 1: CCTV inspection - only site/project specific. Regular **city wide** inspections should be part of municipal Asset Management or O&M programs.

Subject: Comments on the Province of Ontario's Draft Environment Plan

Report to: Planning and Economic Development Committee

Report date: Wednesday, April 17, 2019

Recommendations

1. That staff comments on the Province of Ontario's proposed Environment Plan, *Preserving and Protecting our Environment for Future Generations*, as outlined in Appendix A to Report PDS 8-2019, **BE ENDORSED**; and
2. That a copy of Report PDS 8-2019 **BE CIRCULATED** to the Local Area Municipalities.

Key Facts

- The purpose of this report is to seek endorsement of staff comments on the Province's proposed Environment Plan, *Preserving and Protecting our Environment for Future Generations*.
- On November 29, 2018, the Ministry of the Environment, Conservation and Parks posted the draft Environment Plan on the Environmental Registry for a 60-day consultation period (closing January 28, 2019).
- On December 21, 2018, a Memorandum was circulated to Regional Council to advise of plans to coordinate staff-level comments on behalf of the Region.
- A submission was made to the Province that included staff comments from Planning and Development Services, Public Works, and Public Health and Emergency Services. Several Local Area Municipalities also provided input, which was incorporated into the submission.

Financial Considerations

There are no direct financial considerations associated with commenting on the draft Environment Plan.

Analysis

Overview

Preserving and Protecting our Environment for Future Generations is a broad environmental plan that contains proposed actions in the following areas:

- Protecting our Air, Lakes and Rivers
- Addressing Climate Change
- Reducing Litter and Waste in Our Communities & Keeping Our Land and Soil Clean
- Conserving Land and Greenspace

The Environment Plan sets a target to reduce Ontario's emissions by 30% below 2005 levels by 2030, in line with Canada's 2030 target under the Paris Agreement. Examples of proposed actions to meet this target include creating emission performance standards for large emitters, and creating a four-year \$400 million Ontario Carbon Trust fund to leverage private investment in clean technologies. This is intended to fulfill the Province's obligation under the *Cap and Trade Cancellation Act, 2018* to establish greenhouse gas reduction targets for Ontario and to prepare a climate change plan.

General Comments

Staff generally support many of the Plan's proposals in principle. However, various facts within the Environment Plan related to Ontario's contribution to climate change may be misinterpreted by the public and undermine efforts to take action on climate change due to insufficient context. Recommendations are included within the submission to address these concerns.

In addition, the proposed actions in the Environment Plan lack sufficient detail for fulsome consultation. Staff have requested to be included in any subsequent consultations addressing implementation details and timelines that affect municipal operations.

Detailed comments are included in **Appendix A** and examples are highlighted below.

Protecting our Air, Lakes and Rivers

Staff support proposals in this chapter, such as continuing work to restore and protect our Great Lakes; building on the Ministry's monitoring and drinking water source protection activities to ensure that environmental impacts from road salt are minimized; and reviewing the Province's water taking policies, programs and science tools. Staff also support proposals to improve municipal wastewater and stormwater management and reporting. Staff recommend addressing low impact development techniques in the Environment Plan, finalizing ongoing provincial reviews of stormwater management

guidance documents, updating the F-series procedures, and committing funding to projects such as sewer separation.

Addressing Climate Change

In addition to regulating large emitters and establishing the Ontario Carbon Trust, the Environment Plan includes proposals to increase climate resilience for households and communities. Examples include undertaking a provincial climate impact assessment and vulnerability assessment for key sectors; developing information tools to help homeowners protect their homes from flooding; modernizing the Building Code to improve resilience; reviewing the Municipal Disaster Recovery Assistance Program to incorporate climate resilience; and reviewing land use policies for climate resilience.

Staff generally support the proposals for climate resilience for household and communities, but recommend that the Province's impact assessment include health implications and impacts on vulnerable populations. In addition, the Province should support municipalities to undertake risk-based impact assessments at the local level given the diversity of Ontario's communities. Any updated land use planning direction on climate change adaptation should provide sufficient flexibility to address varying climate change impacts across municipalities. Staff also recommend addressing renewable energy and exploring incentives for new development, such as community district energy. The Environment Plan also confirms the Province's commitment to implement all-day GO Rail service to Niagara, which staff acknowledge and appreciate.

Reducing Litter and Waste in Our Communities & Keeping Our Land and Soil Clean

Staff support proposals in this chapter, such as expanding green bin collection systems in large cities and to relevant businesses; developing a proposal to ban food waste from landfill; developing a plastics strategy; reducing illegal dumping; moving to a producer responsibility model; and exploring options to recover resources from waste. Staff provided information regarding Niagara Region's waste management programs and initiatives, and identified a number of considerations and recommendations with respect to the Province's proposals. Examples of staff recommendations include establishing targets with respect to expanded green bin collection, and considering public spaces and community events as a sector to target for organics collection.

Conserving Land and Greenspace

Staff support proposals such as improving the resilience of natural ecosystems; improving coordination of land use planning and environmental approval processes; and protecting the environment from invasive species. Staff note that further scientific research is required to support increased resilience of natural ecosystems, and increased funding should be provided to stewardship conservation programs.

Alternatives Reviewed

The alternative would be for Council not to endorse staff comments on the proposed Environment Plan. This is not recommended, as it is important for Niagara Region's position to be considered in the development of the final plan.

Other Pertinent Reports

- PDS 22-2018 Climate Change Framework

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Commissioner
Planning and Development Services

Submitted by:

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Appendices

Appendix A

Staff Comments on Draft Environment Plan

Page 5

APPENDIX A: STAFF COMMENTS ON DRAFT ENVIRONMENT PLAN

PLANNING AND DEVELOPMENT SERVICES

Reference in Proposed Environmental Plan	Staff Comments
We can do more to protect ourselves from the extreme weather events that have flooded houses, buildings and roads, overwhelmed aging stormwater and wastewater systems, damaged crops, and brought heavy ice and wind storms that knocked out power for hundreds of thousands of people, including those who are most vulnerable. (p 6)	An educational component is very important in all of this. Suggestion: 1. Encourage educational campaigns on a municipal level, identify importance of it for general public and include this component into the financing structure; 2. Encourage flow monitoring assignments throughout the sanitary system to enhance system knowledge during wet weather events (quantification and qualification of extraneous flows entering the system); 3. Provide support (i.e., appropriate resources) to Conservation Authorities for the development of updated floodplain mapping.
Continue work to restore and protect our Great Lakes (p 12)	Microplastics in our water (including the Great Lakes) needs to be addressed further.
Build on previous successes and continue efforts to protect water quality and ecosystems of the Great Lakes. (p 12)	Niagara Region supports the proposal to continue the existing partnerships with the federal government pursuant to the 'Canada-Ontario Great Lakes Agreement' and the 'Canada-Ontario Lake Erie Action Plan'.
Build on the ministry's monitoring and drinking water source protection activities to ensure that environmental impacts from road salt use are minimized. Work with municipalities, conservation authorities, the private sector and other partners to promote best management practices, certification and road salt alternatives. (p 13)	There are two actions that refer to reducing/ addressing salt as a pollutant – one through the review of the Ontario Great Lakes Strategy (p 12) and one by building onto the Source Water Protection program (p 13). Niagara Region supports progress with respect to addressing salt as a pollutant to both aquatic life, and to our drinking water but it is not clear what actions will be taken. In addition, the Province should contemplate setting standards for salt that are more in line with the acute and chronic toxicity levels in aquatic life. If we protect biodiversity from salt impacts, our drinking water will also be protected.

Reference in Proposed Environmental Plan	Staff Comments
Thoroughly review the province's water taking policies, programs and science tools to ensure that vital water resources are adequately protected and sustainably used. (p 14)	Niagara Region supports the proposal to review the Province's water taking programs, policies, and science tools. In addition, Niagara Region encourages the Province to review the staffing and resources necessary to support, implement, monitor, and enforce these programs, policies, and tools and expand as required.
Ensure the knowledge gained through the drinking water source protection program helps inform our water management programs. (p 14)	Niagara Region encourages the Province to commit to funding the maintenance and updating of the existing Source Water Protection program.
Improve municipal wastewater and stormwater management and reporting (p 15)	While there are several recommendations to improve municipal stormwater management and reporting, there is no mention in the document to Low Impact Development techniques as a management practice. The Provincial Stormwater Management Guidelines (2003) have been subject to a review for a number of years, yet have not been updated. It would be beneficial to update the stormwater management guidance to consider the effects stormwater management may have on ecological and hydrologic functions, by managing stormwater at the source. The Draft Low Impact Development Stormwater Management Guidance Document (2017) has been available for some time and should be finalized.
Update policies related to municipal wastewater and stormwater to make them easier to understand. We will consider how wastewater and stormwater financing could be updated to improve investment and support new and innovative technologies and practices. (p 15)	<p>Niagara Region developed a Combined Sewer Overflow Control & Wet Weather Management Policy recognizing the inter-dependent nature of wastewater collection and treatment system in Niagara. The policy directly supports F-5-5 MECP directives and facilitates the shared funding of strategic and prioritized solutions that mitigate the impacts of wet weather events on municipal sanitary systems, the environment, and individual household basements. Knowing that more than 50% of all extraneous flows enter the system from the private side, the policy addresses municipal projects for private side source control as well.</p> <p>Suggestions:</p>

Reference in Proposed Environmental Plan	Staff Comments
	<ol style="list-style-type: none"> 1. Through the Municipalities for Climate Innovation Program (MCIP), re-develop a process so, the municipalities can easier apply for sewer separation projects since such projects bear the biggest cost and eliminate/reduce most of the wet weather effects to the sanitary system and the environment through the overflows. At the same time, such projects greatly reduce risks of basement flooding; 2. Encourage projects of eliminating and reducing impacts of wet weather through identification of funding category for municipalities working on the private side to disconnect sources of extraneous flows; 3. Identify projects for controlling extraneous flows through a variety of engineering solutions such as full/partial containment, inline upsizing, etc; 4. Develop and clarify the funding structure for infrastructure projects based on the following order: 1. Elimination, 2. Reduction, 3. Control, of wet weather flows;
Encourage targeted investment and innovation in managing wastewater that overflows into our lakes and rivers. (p 15)	Further detail/consultation is needed on how investment in managing wastewater overflow into lakes and rivers will be encouraged.
The following graph shows the rising costs of insured property damage in Ontario between 1983 and 2017, providing an indication of the costs of climate change. The financial costs associated with extreme weather events in Ontario have increased over this period. Chief among factors affecting the increasing costs to Ontarians is the phenomenon of flooding, and more specifically,	This report indicates that: "Chief among factors affecting the increasing costs to Ontarians is the phenomenon of flooding [...]" However many watercourses in Ontario have either inadequate floodplain mapping or no floodplain mapping at all. As such, Niagara Region strongly encourages the Province to make available sufficient funding to provide for the generation and updates of floodplain maps in order to better delineate areas that are prone to riverine flooding.

Reference in Proposed Environmental Plan	Staff Comments
residential basement flooding. (p 18)	
Undertake a provincial impact assessment to identify where and how climate change is likely to impact Ontario's communities, critical infrastructure, economies and natural environment. The assessment would provide risk-based evidence to government, municipalities, businesses, Indigenous communities and Ontarians and guide future decision making. (p 19)	The proposed provincial impact assessment may be too high-level to be a useful tool for municipalities. There should also be support for municipalities to undertake risk-based impact assessment at the local level.
Support communities by demonstrating how climate science can be applied in decision making to improve resilience. (p 19)	Support should also be provided to encourage municipalities to integrate climate change adaptation into plans, strategies, and risk management processes.
Review the Municipal Disaster Recovery Assistance program to encourage municipalities to	Enhancements to the Municipal Disaster Recovery Assistance program should be assessed in order to encourage infrastructure investments as adaptation to extreme weather.

Reference in Proposed Environmental Plan	Staff Comments
<p>incorporate climate resilience improvements when repairing or replacing damaged infrastructure after a natural disaster. Since the Municipal Disaster Recovery Assistance program was launched in 2016, over \$2.6 million has been provided to 11 municipalities. (p 20)</p>	
<p>10 Ways to Prevent Home Basements Flood (p 20)</p>	<p>There are still numerous houses with downspouts running through the ground to a sanitary lateral together with weeping tiles.</p> <p>Suggestion: Include pictures for:</p> <ol style="list-style-type: none"> 1. Downspout disconnection, 2. Weeping tile disconnection and re-direction, 3. Sump pit/sump pump installation; <p>There are evident issues associated with a backwater valve installed that could lead to a basement floor cracking if the soil surrounding the house is saturated enough to create an extra pressure from the outside to the foundation. Also, general perception is that with a backwater valve in place, the house is protected from flooding. What the general public does not understand is that a homeowner can flood his own house by using washing machine, taking showers, etc. during a wet weather event when the backwater valve is closed.</p> <p>Suggestion: Make a cautionary statement when presenting this way of protection from flooding.</p>
<p>Review land use planning policies and laws to update policy direction on climate resilience. This will help make the way our communities are planned and designed more</p>	<p>Niagara Region supports a review of the planning framework as it relates to climate resilience. Further policy direction and guidance from the Province on climate change adaptation is welcome.</p> <p>The Province should release further details with respect to the land use planning review. In addition, any</p>

Reference in Proposed Environmental Plan	Staff Comments
responsive and adaptive to changing weather conditions, such as improving the way that stormwater is managed. (p 21)	updated policy direction should be developed in consultation with municipalities, and provide sufficient flexibility to address varying climate change impacts. Each municipality experiences the impacts of climate change differently, and must customize their adaptation efforts to the risks and vulnerabilities present in their communities.
The Ontario Carbon Trust is an emission reduction fund that will use public funds to leverage private investment in clean technologies that are commercially viable. For this action we estimate a fund of \$350 million will be used to leverage private capital at a 4:1 ratio. Estimates will depend on the final design and mandate of the trust. The estimates also include the potential emission reductions associated with a \$50 million Ontario Reverse Auction designed to attract lowest-cost greenhouse gas emission reduction projects. (p 24)	There is not enough information to properly consider the Ontario Carbon Trust proposed in the document. Given it is premised on investing public money into private sector, more information should be made available.
Use Energy and Resources Wisely (p 31)	There is no emphasis at all on renewable energy investment, thereby reducing dependency on non-renewable resources. Green energy seems to have disappeared.
Work with the Ontario Energy Board and natural gas utilities to increase the cost-effective conservation of natural gas to simultaneously reduce emissions and lower energy bills. (p 32)	Work with OEB and natural gas utilities for conservation efforts should also consider incentives for new development (community district energy, heat pumps etc.), not only homeowner energy retrofits.

Reference in Proposed Environmental Plan	Staff Comments
<p>This government is expanding GO service and making it easier for commuters and members of the community to move around the GTHA. More riders in seats relieves congestion on the roads. We're providing more reliable, predictable journeys across the region – greatly improving the daily transit experience. These improvements bring us a step closer to our vision to deliver twoway, all-day GO service. (p 38)</p>	<p>Niagara Region thanks the Province for its accelerated January 2019 implementation of daily GO Rail service to St. Catharines and Niagara Falls. The Region will continue to work closely with the Province to establish GO Rail service delivery to Grimsby, as well as towards achieving its commitment to implement daily all-day GO Rail service to each of Niagara's stations by 2023.</p>
<p>Move Ontario's existing waste diversion programs to the producer responsibility model. This will provide relief for taxpayers and make producers of packaging and products more efficient by better connecting them with the markets that recycle what they produce. (p 43)</p>	<p>Producers should be responsible for their products for the full life cycle. This should be expanded to all retailers that provide products in single use packaging (restaurants, etc.)</p>
<p>Revise the brownfields regulation and the record of site condition guide to reduce barriers to redevelop and revitalize historically contaminated lands, putting vacant prime land back to good use. (p 45)</p>	<p>Cutting red tape in the brownfield regulations and reusing soil should not compromise human or environmental health.</p>

Reference in Proposed Environmental Plan	Staff Comments
Work with municipalities, conservation authorities, other law enforcement agencies and stakeholders to increase enforcement on illegal dumping of excess soil. (p 45)	This review is supported. There may be opportunities to consider regulations relating to enforcement on private properties and fines. A tracking system for reusing excess soil may assist in municipal enforcement efforts for illegal dumping.
Collaborate with partners to conserve and restore natural ecosystems such as wetlands, and ensure that climate change impacts are considered when developing plans for their protection. (p 47)	Further scientific research and guidance is required to assist with increasing the resiliency of natural ecosystems in the context of climate change. Funding and support for such science will be required in order to fulfill the goal.
Protect vulnerable or sensitive natural areas such as wetlands and other important habitats through good policy, strong science, stewardship and partnerships. (p 48)	There are a number of stewardship conservation programs that are not adequately funded and if they were, could provide more on-the-ground results (i.e., Species-at-Risk Stewardship Fund, Land Stewardship & Habitat Restoration Program, etc.).
Improve coordination of land use planning and environmental approval processes by updating ministry guidelines to help municipalities avoid the impacts of conflicting land uses. (p 48)	<p>It is understood that to support conservation and environmental planning, the Environmental Plan proposes to review and update legislation to ensure approval processes are well coordinated. There are a number of guidance documents that have been released by the Province but not finalized, which would assist in improving coordination (Watershed Planning Guidance in Ontario, Low Impact Development Stormwater Management Guidance Manual, etc.).</p> <p>Further detail/consultation is needed regarding this proposal.</p>
Sustainable Forest Management (p 50)	Municipalities may benefit from a province/regional specific guide on best practices for managing forests, sustainable forest management plans.

Reference in Proposed Environmental Plan	Staff Comments
Protect our natural environment from invasive species by working with partners and other governments and using tools to prevent, detect and respond to invasions. (p 51)	Enhancing and maintaining biodiversity is one of the best ways to protect against invasive species and this is not mentioned.
An advisory panel on climate change will be established to provide advice to the Minister on implementation and further development of actions and activities in our plan specific to climate change. (p 53)	The advisory panel on climate change should include municipal representation to gain a local perspective on implementation.
Begin implementing priority initiatives. (p 53)	There are many references to the Province supporting partnerships with municipalities to address certain elements (i.e., stormwater, land use planning) however it is not clear what actions will be taken to further support. Consideration should be given to resource allocation, particularly programming and funding opportunities, to enhance the ability for municipalities to address some of the identified actions (ex. Explore opportunities to enhance coordination and guidance for municipalities to help them consider climate change in their decision-making; work with municipalities to develop climate and energy plans....).

PUBLIC WORKS

Reference in Proposed Environmental Plan	Staff Comments
<p>Increase transparency through real-time monitoring of sewage overflows from municipal wastewater systems into Ontario's lakes and rivers. Work with municipalities to ensure that proper monitoring occurs, and that the public is aware of overflow incidents. (p 15)</p>	<p>Niagara Region currently monitors and reports its combined sewer overflows and publicly report the information on dates, times and volumes to the public via our website. The site gets very few "hits" and the information is rarely requested. As the overflows occur during wet weather, when the public is unlikely to be using the water body recreationally, we are unsure as to the benefit of real-time reporting. As the information is already reported in real-time to the MOE/MECP as a requirement of the Environmental Compliance Approval system, it would seem to be more efficient for the MOE/MECP to develop a real-time reporting system to avoid duplication of efforts amongst all the municipalities currently regulated. This would avoid unnecessary costs to develop reporting systems that are not budgeted for or requested by the rate payers.</p>
<p>Update policies related to municipal wastewater and stormwater to make them easier to understand. We will consider how wastewater and stormwater financing could be updated to improve investment and support new and innovative technologies and practices. (p 15)</p>	<p>Niagara Region supports the updating of the current F-5-5 policy. We would prefer these documents be turned into standards as opposed to the current "guideline" approach. The use of the word "guideline" and "procedures" has always been problematic for the regulated community and others as to the interpretation or legal basis of not designing to these old documents. Using the "standard" approach, it would remove ambiguity and be understood that a design either complies with the standard (or does not). One typically designs a facility to meet a standard (whether it's a CSA, ASTM, NSF or other standard). A guideline is more of a "best practice" approach that doesn't have any legal consequence. The Region supports an update of all the F-series "procedures" and would like to be part of any working group set up to do this.</p>
<p>We will work with partners on ways to make it easier for residents and businesses to waste less food or reuse it for beneficial purposes such as compost. (p 31)</p>	<p>Niagara Region supports the Ontario Food Recovery hierarchy consisting of the following steps in order of importance: (I) Reduce; (ii) Feed People; (iii) Recover Resources. When considering recovery rates it is important to consider the parameters used to in the calculation. Comments on other action items in this plan specifically reflect Niagara Region's position that</p>

Reference in Proposed Environmental Plan	Staff Comments
	individual sectors in the province should have their own measurable targets and metrics.
Quick Fact: About 60% of Ontario's food and organic waste is sent to landfills which emits methane – a potent greenhouse gas – when it decomposes. Efficient diversion of household waste from landfills is an important tool in the fight against climate change. To read more about our plan to fight litter and waste, see page 40. (p 32)	Niagara Region's position to date, reflected in the Province's Food and Organic Waste Framework, is that actions focusing on prevention of food and organic waste are critical. We also support the Province's expanded vision to take a systems approach to food and organic waste generation, management and recovery, recognizing that all stages of supply and production have a role to play in moving towards a circular economy.
Expand green bin or similar collection systems in large cities and to relevant businesses. (p 41)	<p>Niagara Region supports this action and currently offers unlimited organics collection for small to medium sized Industrial, Commercial and Institutional (ICI) properties. Carts are priced for cost recovery only, encouraging participation.</p> <p>Provincial plans should specifically reflect expansion and targets for ICI and high and low-rise multi-residential (multi-res) sectors as participation rates for these sectors are typically lower than for Low Density Residential (LDR). Multi-res high-rise buildings may face unique challenges with respect to collection of organics materials, depending on age and design. Collection of organics must be as convenient as garbage collection is to encourage participation and improve program participation rates in these sectors.</p> <p>The Province should also consider public spaces and community events as a sector to target (e.g. festivals generate food waste). Some municipalities, including Niagara Region, already offer organics collection at special events.</p> <p>As noted in previous EBR comments on the Province's Food and Organic Waste Framework, parameters to be used for measuring success, and the detailed calculation to establish a baseline and future</p>

Reference in Proposed Environmental Plan	Staff Comments
	<p>measurement for the percentage of waste reduction and resource recovery, need to be defined, separately, for each sector. The Province should work with all stakeholders to establish timelines, as municipalities must budget and plan for processing capacity and end markets must be identified. Additionally, beneficial activities such as on-site management of organics through grasscycling and backyard composters should not be reduced through implementation or expansion of organics collection programs.</p>

Reference in Proposed Environmental Plan	Staff Comments
<p>Develop a proposal to ban food waste from landfill and consult with key partners such as municipalities, businesses, and the waste industry. (p 41)</p>	<p>Niagara Region is supportive of a disposal ban, as noted in previous EBR comments on the Province's Food and Organic Waste Framework.</p> <p>Materials to be included in the ban must be clearly defined and the program should be further expanded to include branded (non-food) organics, including compostable packaging and other materials, some of which may already be acceptable in local programs (e.g. leaf and yard waste and pet waste).</p> <p>A disposal surcharge could potentially be used in conjunction with a ban to provide some allowance for incidental amounts of designated materials.</p> <p>Disincentives in the form of levies/penalties are needed to discourage private sector facilities from accepting banned materials.</p> <p>In order for bans to be effective, targets must be established and implementation time is needed between diversion program start, target dates and enforcement of a ban. For example, Niagara Region currently collects from LDR, ICI and multi-res locations in the same routes, and phased-in targets might be different for each sector. Participation and contamination rates currently vary by sector and this may make thresholds for compliance and enforcement more challenging. Implementation time between the various sectors should be done within reasonable time limits in order to ensure consistency in messaging to the public.</p> <p>Compensation to municipalities should be provided for any additional costs related to disposal bans, as food and organics are costly waste streams for municipalities to collect and process. The Province must provide the necessary oversight and enforcement resources to ensure compliance of disposal bans.</p> <p>Timelines are critical for planning by municipalities as many, including Niagara Region, have a tonnage threshold at which the processing costs increase, and many municipalities have little or no excess capacity.</p>

Reference in Proposed Environmental Plan	Staff Comments
<p>Educate the public and business about reducing and diverting food and organic waste. (p 41)</p>	<p>Niagara Region's position, as noted in previous EBR submissions for Ontario's Food and Organic Waste Framework, is that actions focusing on prevention of waste, including education, are critical in attaining goals minimizing the amount of food and organic waste to be disposed of. Niagara Region will continue to develop Promotional and Educational material (P&E) and programs aimed at preventing food waste, for example by participating in and leveraging work completed through the Ontario Food Collaborative (OFC) and other initiatives. Province-wide P&E messaging to prevent food waste is supported.</p> <p>To date, Province-wide P&E messaging on organics diversion collection programs has been difficult to deliver and may contribute to resident confusion due to the differences between municipal processing systems and the various materials that can be accepted in each system. Also P&E needs to be customized to reflect needs of different sectors, such as lower participation and higher contamination rates experienced by the multi-res sector.</p> <p>Niagara Region's residential food/organics diversion program rate is less than 50% based on a 2015/2016 waste composition study. Participation rates in organics programs for the ICI sector tend to be even lower (in Niagara between 6% and 14% of ICI properties in downtown business areas use organics, according to audits completed between 2014 and 2018). Although education programs do work, further actions are required. Niagara Region had suggested in previous comments for the Food and Organic Waste Strategy that food waste reduction in the ICI sector could be better achieved through provincial policy/legislative changes such as policies similar to those in France/Europe that allow for and reduce risk to retailers when donating food as well as incentives to reduce food waste at the producer/retail level.</p>
<p>Work with other provinces, territories and the federal government to develop a plastics strategy to reduce plastic waste and limit</p>	<p>Similar to our position regarding food and organic waste, Niagara Region believes that actions focusing on reduction and reuse are critical. Municipal waste management systems must currently handle plastics at the end of the lifespan, whether through recycling</p>

Reference in Proposed Environmental Plan	Staff Comments
micro-plastics that can end up in our lakes and rivers. (p 42)	programs or as litter, and as such, municipalities are an important stakeholder. Niagara Region looks forward to a coordinated effort with all levels of government. Any plastics strategy should also include the development and retention of recycling markets in Ontario.
Seek federal commitment to implement national standards that address recyclability and labelling for plastic products and packaging to reduce the cost of recycling in Ontario. (p 42)	Niagara Region is supportive of actions to reduce the cost of recycling, such as through implementation of national standards.
Ontario will establish an official day focused on cleanup of litter in Ontario, coordinated with schools, municipalities and businesses, to raise awareness about the impacts of waste in our neighbourhoods, in our waterways and in our green spaces. (p 42)	<p>Niagara Region is supportive of this action and is undertaking an educational anti-litter campaign in 2019. The objectives of this campaign are to: (i) decrease the amount of litter in communities, specifically neighbourhoods, parks and other outdoor public spaces and; (ii) increase understanding and use of proper disposal methods for commonly littered items. Strategies include an education piece (targeted public space advertising, ads in newspaper and social media), provision of support to coordinated activities, and for Niagara Region to act as a hub for community clean ups so residents can participate.</p> <p>It would be beneficial for the Province to advertise and promote not only the official clean-up day, but also other local cleanup events, and to fund all or a portion of these clean-up events.</p>

Reference in Proposed Environmental Plan	Staff Comments
<p>Work with municipal partners to take strong action against those who illegally dump waste or litter in our neighbourhoods, parks and coastal areas. (p 42)</p>	<p>Niagara Region is supportive of initiatives to reduce illegal dumping and is proactive in taking action against offenders. A reporting tool, accessible on-line or by phone, is available. A monetary reward (a shared cost between Niagara Region and the appropriate LAM) is provided to persons reporting illegal dumping when the report results in an act of compliance (i.e. the offender returns to the site and removes the dumped material) or in a conviction. In 2017 Niagara Region's Illegal Dumping Working Group (IDWG), reestablished in 2012 and comprised of Regional staff and LAM representatives, formalized a partnership with Crime Stoppers of Niagara (CSN) to aid in public awareness of initiatives and allow all parties to better utilize resources. Residents can use CSN's anonymous tipster system as an alternative option for reporting incidents of illegal dumping, and are still eligible for rewards related to compliance and conviction as outlined above. CSN also aids in the promotion of illegal dumping campaigns on their social media platforms. In 2018 the IDWG continued to focus on installation of illegal dumping signage at hot spots, continued to promote Niagara Region's illegal dumping campaign and reporting tool via multiple avenues including newspaper ads, banners, transit ads, brochures and social media, and provided public litter bin stickers tailored to each LAM, along with other actions.</p> <p>Niagara Region also works with local residents associations to help with concerns of illegal dumping and contamination. In 2018 Niagara Region completed a litter bin "blitz" in LAMs to reduce illegal dumping in litter receptacles, an ongoing issue in Niagara Region.</p> <p>In 2018 a total of 755 illegal dumping reports were received at Niagara Region, an increase of 11% compared to 2017, and two offence notices were issued, along with 142 warning letters. Challenges for by-law officers include the need for evidence of the offender (e.g. material with the name and address of the offender) and the availability of a witness who is willing to testify in court. While bylaw officers have jurisdiction on public property, illegal dumping often occurs on private property.</p>

Reference in Proposed Environmental Plan	Staff Comments
<p>Develop future conservation leaders through supporting programs that will actively clean up litter in Ontario's green spaces, including provincial parks, conservation areas and municipalities. (p 43)</p>	<p>Niagara Region supports this action. One example is our Public Spaces Recycling (PSR) Program. To encourage installation of PSR containers in indoor and outdoor public spaces with higher public traffic, funding for the cost of containers is provided on a 50/50 cost-sharing basis between Niagara Region and LAMs.</p> <p>Niagara Region offers Special Events Recycling and Organics (SER&O) programs throughout the year to all public events within Niagara Region. A unique aspect of the program is the partnership with Eco-Defenders, a local non-profit community group that provides trained waste sorting volunteers to public events. Material diverted by Eco-Defenders is free of contamination and minimizes garbage produced by events, improving the diversion rates for Niagara Region's SER&O programming.</p> <p>As demonstrated by these examples, Niagara Region sees high value in the continued support of local programs promoting clean-up of litter and diversion of waste.</p> <p>All community events should be mandated to have diversion programs (twinned with garbage) and the Province should providing funding for volunteers to help sort waste properly at events. Public events should be</p>

Reference in Proposed Environmental Plan	Staff Comments
	waste-free and generate only acceptable recyclable and compostable material.
Connect students with recognized organizations that encourage environmental stewardship so they could earn volunteer hours by cleaning up parks, planting trees, and participating in other conservation initiatives. (p 43)	Niagara Region has traditionally supported waste diversion programs in educational facilities and we continue to expand our programming.
Work with municipalities and producers to provide more consistency across the province regarding what can and cannot be accepted in the Blue Box program. (p 43)	Niagara Region supports a consistent Provincial approach to standardization of materials accepted in the Blue Box program that should be done as part of the change to full producer responsibility. To achieve this, materials should not be removed from the program and if they are, alternative approaches for disposal must be considered, with producers paying for management of the material in the waste management system. Consumer convenience should be maintained or improved, and access to existing services should not be negatively impacted by any changes to Blue Box program.
Explore additional opportunities to reduce and recycle waste in our businesses and institutions. (p 43)	<p>Niagara Region is supportive of initiatives that target waste reduction and diversion in the ICI sector. As noted earlier, Niagara Region currently offers unlimited curbside recycling and organic pick-up service to small and medium sized businesses. We have created an environmental program specific to businesses: Rethink Your Waste at Your Workplace. This recognition program includes an educational component and rewards businesses that make efforts to maximize their waste diversion efforts.</p> <p>Similar voluntary programs have been in existence for a number of years, however, to make tangible progress towards reducing and recycling waste in the ICI sector, it would be beneficial to establish mandatory Provincial targets with firm timelines for the sector.</p>

Reference in Proposed Environmental Plan	Staff Comments
	Municipalities need to be compensated for ICI materials that are municipally collected as part of the integrated collection system.
Move Ontario's existing waste diversion programs to the producer responsibility model. This will provide relief for taxpayers and make producers of packaging and products more efficient by better connecting them with the markets that recycle what they produce. (p 43)	<p>Niagara Region is fully supportive of making producers responsible for properly managing the waste they produce, and believes the internalization of the cost of end-of-life product packaging with all-in pricing to remove costs from municipalities/taxpayers is the best option for Ontario. This provides the opportunity for design for the environment and less disposal.</p> <p>Niagara Region agrees with the Association of Municipalities of Ontario (AMO), who note that, "it is to the benefit of all stakeholders and citizens to have the Blue Box transition process start with the Minister of Environment, Conservation and Parks issuing a wind-up letter early in 2019, allowing for adequate time for robust planning and consultation on the development of a Paper Product and Packaging Regulation under Resource Recovery and Circular Economy Act, 2016 (RRCEA)".</p> <p>Furthermore, the list of designated materials should be reviewed and items such as construction and demolition waste included under producer responsibility.</p>
Investigate options to recover resources from waste, such as chemical recycling or thermal treatment, which have an important role – along with reduction, reuse and recycling – in ensuring that the valuable resources in waste do not end up in landfills. (p 43)	<p>Incentives to promote waste reduction (avoid waste generation) followed by reuse, recycling/composting are needed. These are higher value activities and although recovery is secondary, there should be recognition of energy production from biological treatment as diversion (e.g. anaerobic digestion to produce biogas or biological drying of organics into biofuel).</p> <p>Niagara Region is supportive of this and currently completes a formal yearly (at minimum) review of alternative waste management technologies. Niagara Region continues to engage other neighbouring municipalities in discussions related to available capacity at their current/future alternative waste management technology facilities and/or future needs that could be addressed by partnering with Niagara Region on alternative technologies.</p>

Reference in Proposed Environmental Plan	Staff Comments
Encourage increased recycling and new projects or technologies that recover the value of waste (such as hard to recycle materials). (p 43)	There is a desire for access to increased options for recycling unacceptable Blue Box items by residents. While Niagara Region supports the goal of increased recycling and development of new technologies, the approach to encourage improved environmental outcomes should also include mechanisms to discourage the use of difficult to recycle materials. With access to additional funding and Provincial support, innovative programs to increase municipal diversion rates could be more widely implemented.
Ensure new compostable packaging materials in Ontario are accepted by existing and emerging green bin programs across the province, by working with municipalities and private composting facilities to build a consensus around requirements for emerging compostable materials. (p 43)	<p>Niagara Region is supportive of this action as municipalities currently face challenges with respect to compostable packaging, namely that the material does not all break down in the various organic processing systems, at the same rate. Consensus around requirements would ensure the effectiveness of producer P&E material and also reduce resident confusion. Requirements would also help ensure that producers do not move to compostable packaging simply to avoid producer responsibility for designated paper and packaging, thereby shifting the problem.</p> <p>At the same time, the requirement to accommodate standard compostable material may mean that some municipalities must invest in new technology. Cost and capacity is a concern as increased tonnages will result in increased processing contract costs. Municipalities must be supported in these efforts.</p>
Consider making producers responsible for the end of life management of their products and packaging. (p 43)	This aligns with previous positions put forward by Niagara Region. Niagara Region requests the Province take a firm stance, for example, designating all packaging, whether it is recycling or compostable. Producers should pay for management of designated materials regardless of the stream in which they end up. Niagara Region also supports designation and full producer responsibility of new materials such as additional electronics (appliances, electrical tools), florescent bulbs and tubes, mattresses, carpets, clothing and textiles, furniture and the bulky items. Transition plans particularly for the Blue Box program must address municipal contracts and assets and how

Reference in Proposed Environmental Plan	Staff Comments
	to avoid stranded assets. Transition to a producer responsibility regime could lead to Niagara Region's Recycling Centre becoming a stranded asset depending on the strategies put forth to achieve producer responsibility.
Cut regulatory red tape and modernize environmental approvals to support sustainable end markets for waste and new waste processing infrastructure. (p 44)	<p>Access to stable and sustainable end markets for processed materials are critical to the successful implementation of the Province's plan. This includes the development and implementation of local / domestic end markets.</p> <p>As previously noted, increased organics tonnages due to an organics ban and increased P&E, requires that municipalities have the capacity to process and manage the material. The process could be eased with modernized environmental approval processes. With respect to Blue Box materials, market prices have fluctuated in recent years and access to the world-wide market requires production of a consistent and un-contaminated product. Funding and improved access to new waste processing infrastructure might allow for better sorting and processing of material, resulting in an improved and more desirable product for end-markets along with increased diversion.</p> <p>Niagara Region is supportive of streamlining approvals for waste processing infrastructure.</p>
Provide municipalities and the communities they represent with a say in landfill siting approvals....The province will look for opportunities to enhance municipal say while continuing to ensure that proposals for new and expanded landfills are subject to rigorous assessment processes and strict requirements for design, operation, closure,	Niagara Region is supportive of streamlining landfill site approvals.

Reference in Proposed Environmental Plan	Staff Comments
post-closure care and financial assurance. (p 44)	
Set clear rules to allow industry to reduce constructions costs, limit soil being sent to landfill and lower greenhouse gas emissions from trucking by supporting beneficial reuses of safe soils. (p 45)	<p>Niagara Region agrees that excess soil from construction projects should be beneficially re-used wherever possible. Landfill sites should not be the first option for soils disposal, as landfill capacity is required for solid waste disposal. Niagara Region agrees that beneficial soil re-use sites should be identified locally to reduce trucking distances, whereby reducing cost and reducing greenhouse gas emissions.</p> <p>Previous modification to the MECP Excess Soil Disposal Framework included practical options for municipalities to apply with respect to soil reuse. For example, municipalities can reuse salt contaminated soils at other locations that have similar salt impact using local background soil quality as a benchmark, rather than immediately resorting to landfilling if the soil exceeds the MECP Ontario background concentrations. The valuable input and ideas provided in previous EBR consultations should be incorporated in future plans.</p>
Work with municipalities, conservation authorities, other law enforcement agencies and stakeholders to increase enforcement on illegal dumping of excess soil. (p 45)	<p>As previously noted, Niagara Region by-law officers do not have jurisdiction over illegal dumping on private lands, and illegal soil dumping on public land in Niagara Region is not a common practice. (Some of the Local Area Municipalities in Niagara have site-alteration by-laws to regulate illegal dumping of fill.)</p> <p>Clarification regarding who is responsible for monitoring of excess soil movement should be provided. Contamination is based on soil chemistry and as such, visual inspection is not sufficient. Currently our by-law officers focus on the illegal dumping of waste material and monitoring/enforcement of illegal soil dumping is difficult due to the nature of the material as it is typically lacking supporting documentation required for conviction.</p> <p>A provincial framework for development of Excess Soil Management Plans (ESMP) developed in consultation with stakeholders, would help ensure consistency across Ontario municipalities.</p>

Reference in Proposed Environmental Plan	Staff Comments
Consider approaches for the management and spreading of hauled sewage to better protect human health and the environment (including land and waterways) from the impacts of nutrients and pathogens. (p 45)	In Niagara, all sewage is hauled to municipally owned wastewater treatment plant for disposal and treatment. No spreading of raw sewage occurs on agricultural land here. Niagara Region has implemented a successful sewage biosolids management program that works well and is welcomed and supported by the local agricultural industry. The nutrient rich biosolids, from anaerobically digested sewage are land applied to give the soils the required nutrients needed to make local crops thrive. This program has worked effectively for several decades and Niagara would want to have input if any changes are being contemplated that may impact our contractual obligations or the agricultural community in general.
Continue to consult with the public and engage with Indigenous communities. (p 52)	Niagara Region is supportive of continued public engagement. Programs are most effective when all stakeholders are engaged in defining and developing opportunities, leading to better uptake and support. Waste Management Services (WMS) actively engages with all levels of stakeholders, including citizens, with respect to waste management policies and programs. As part of the Niagara Region's Humberstone Landfill Site Expansion EA process, dedicated meetings with Indigenous communities including Six Nations and Niagara Region Metis Council occurred. An EA Advisory Group comprised of local residents and businesses was also established. These efforts helped develop trust with the neighbouring community and Aboriginal Groups resulting in successful EA.
Begin implementing priority initiatives. (p 53)	Stakeholders need information about short and long-term timelines and access to detailed implementation plans in order to best support the Province with implementation of priority initiatives.
Measure and report on progress. (p 53)	Creation of data collection mechanisms to measure progress in waste reduction and resource recovery is vital. The province should have separate targets and metrics for reporting progress in reducing waste in the disparate sectors (LDR, ICI and multi-res sectors) and these targets should be enforced. Targets and metrics

Reference in Proposed Environmental Plan	Staff Comments
	should be developed in partnership with all stakeholders, including municipalities.

PUBLIC HEALTH AND EMERGENCY SERVICES

Reference in Proposed Environmental Plan	Staff Comments
At the same time, climate change threatens these resources and our homes, communities and businesses, infrastructure, and our locally grown food and crops. (p 6)	<p>Could be strengthened by elaborating on the increasing evidence behind the impacts of climate change on food systems and how it is causing food system emergencies and disturbances. (Seed & Rocha, 2018). For example, the price of vegetables – a prime under-consumed food category based on prevalent nutrition recommendations – is predicted to increase due to changing weather patterns caused by climate change.</p> <p>It is also important to recognize that “blanket” policies based on locally-sourced foods are not best practice, given the diversity of challenges to food access.</p>
It (climate change) also threatens food security and road access for remote First Nations, as well as the health of ecosystems across our great province. (p 6)	Food security should be clarified to include the ability to secure safe, healthy, personally/culturally acceptable foods, and how this has a significant impact of human and planetary health.
In 2001, the government of the day announced the closure of the Lakeview Generating Station, setting the stage for the phase out of coal-fired electricity generation which remains the largest single greenhouse gas reduction in Canadian history. (p 7)	Although the phase-out of coal-powered plants was and is a key contributor in climate change action, it is important to note that the electricity sector tends to be among the smallest contributor of GHG emissions – which is consistent across all sectors and all provinces. Identifying the full emissions produced from other sectors, such as transportation, will better inform a more accurate representation of Ontario’s current carbon foot print and the role the province plays in GHG emissions for the country.

Reference in Proposed Environmental Plan	Staff Comments
<p>Measured against the same base year of Canada's target under the Paris Agreement (2005), the province's total greenhouse gas emissions have dropped by 22% – even while the rest of Canada saw emissions increase by 3% during that same time. (p 7)</p> <p>Doing Canada's heavy lifting on greenhouse gas emission reductions came at a cost that was too high for Ontario families and businesses. (p 7)</p>	<p>It is important to recognize and acknowledge in the Plan that Ontario is the second largest contributor to GHG emissions in all of Canada (23%), preceded only by the highly driven oil and gas province of Alberta (37%) (Environment and Climate Change Canada, 2016). Ontario and Alberta together represent 60% of Canada's overall emissions produced. Without considering emissions for Ontario and Alberta, the rest of the country actually saw a decrease in emissions by 5.4%. Given the physical attributes of the province and its current emission practices, Ontario is a huge driver of the national average. As such, the province has a key role in reducing GHG emissions, which is not sufficiently addressed in the current draft of the plan.</p> <p>Hence, it is very appropriate (and needed) for Ontario to continue to contribute to emission reduction in Canada, Furthermore, it is notable that Ontario only had the 3rd largest percentage decrease across the country – further proving that emission reduction is a collective effort, and not just solely at the expense of Ontario as the statement suggests.</p>
<p>Quick Fact: As of 2013, Canada is responsible for 1.6% of global emissions, with Ontario responsible for less than 0.4% of global emissions. (p 16)</p>	<p>Although this is an accurate statement, without a sufficient background in climate knowledge, it is very easy to misinterpret this statement and downplay the significance of both 1.6% and 0.4% (respectively). The 1.6% of emissions represents the fact that Canada is the 9th largest GHG emitter (out of 195 countries) which is a significant number, and even more so when considering population density (making Canada the 3rd highest polluter per capita in the world). Without considering this background information, the fact presented in the Plan insufficiently represents Ontario's role in climate change and should consider rephrasing.</p>
<p>Undertake a provincial impact assessment to identify where and how climate change is likely to impact Ontario's communities, critical infrastructure, economies and natural environment.</p>	<p>It is important to include the health implication in this assessment to bring awareness to communities on the current and projected implications of climate change on health. Further improvement would include:</p> <ul style="list-style-type: none"> • Applying the health equity lens for impacts on vulnerable populations <p>(See page 39 for further information).</p>

Reference in Proposed Environmental Plan	Staff Comments
<p>The assessment would provide risk-based evidence to government, municipalities, businesses, Indigenous communities and Ontarians and guide future decision making. (p 19)</p>	<ul style="list-style-type: none"> • Considering how different sectors may be affected by climate change, as well as how such sectors may contribute to climate change. • Engaging communities to avoid potential rejection of sustainability principles/measures on the basis of ethnicity, culture, religion, etc. <p>It is recommended to consider the <i>local</i> lens when completing such assessments as impacts heavily vary between communities and – since the province of Ontario is so large and diverse – it is important to not conclude with a “one-size-fits-all solution” but consider how to use local risk-reduction information to benefit individual communities.</p>
<p>Ontario will reduce its emissions by 30% below 2005 levels by 2030.</p> <p>This target aligns Ontario with Canada’s 2030 target under the Paris Agreement.</p> <p>This is Ontario’s proposed target for the reduction of greenhouse gas emissions, which fulfills our commitment under the Cap and Trade Cancellation Act, 2018. (p 21)</p>	<p>The Environment Plan proposes a new target goal: <i>a 30% reduction in the targets of GHG emissions based on 2005 baseline levels, by 2030</i>. This new target represents a 26.9% increase in GHG emissions from the goals outlined in the Climate Change Action Plan by the previous government leadership. To put this increase into perspective, the proposed change will produce 30 additional megatonnes (Mt) of pollution, which is equivalent to the reductions achieved by the phase out of coal-fired electricity generation - quoted by the plan as the “largest single greenhouse gas reduction in Canadian history” (p. 7). With each additional tonne of GHG emitted, the issue of climate change becomes much more unmanageable and costly (ECO, 2018). Thus, efforts must be focused on decreasing GHG emissions in Ontario, not increasing as the current plan proposes.</p> <p><i>Initial</i> Climate Change GHG Target Goal: Reduce emissions by 37% below 1990 levels (179.2 Mt) by 2030 = 112.9 Mt</p> <p><i>Proposed</i> Environment Plan GHG Target Goal: Reduce emissions by 30% below 2005 levels (204.7 Mt) by 2030 = 143.3 Mt</p> <p>This represents a difference of 30.4 Mt more GHG emission (26.9% increase in pollution).</p>

Reference in Proposed Environmental Plan	Staff Comments
	<p>Ontario has already experienced an increase of 1.5°C since 1948, with an additional projected increase of 2.5°C by the year 2050 - which can lead to irreversible and catastrophic results for our province, if strong mitigation efforts are not taken (ECO, 2018). Substantial reduction of GHG emissions are essential preventative measures to ensure that global temperature averages do not exceed 2°C above pre-industrial levels (Haines, 2009). In the most recent Special Report released by the International Panel on Climate Change (IPCC), evidence calls for <i>greater</i> mitigation efforts in order to achieve this goal and avoid potentially catastrophic impacts (2018). For instance, the Insurance Bureau of Canada (IBC) estimates that up to 10% of Canadian properties may soon be too high to be insured, which will make it much more difficult for families to protect themselves, and thus be more vulnerable to the impacts of climate change (2015).</p> <p>In addition to the low GHG targets, the projected GHG emissions presented in the Environment Plan appear to be unclear. More transparency is needed around what measures were used to predict GHG emission levels under the “business as usual” scenario which appears to project no change (i.e. staying consistently within the range of 161-162 Mt), rather than displaying an increasing trend as projected by the evidence in the leading modelling practices. Furthermore, the Environment Plan does not include any mention of targets or actions beyond the year 2030. Not only are these long-term goal considerations (i.e. 2050, 2080) essential to a strong climate plan, overlooking such projections makes it much more difficult to achieve the regarded standard of a low carbon economy.</p> <p>Furthermore, it is not reasonable to justify these target changes as a way to align with the Canadian federal targets, which have largely been recognized as “highly insufficient” by leading climate progress tracking (Action Climate Tracker, 2017). Scientific evidence suggests that commitments to deeper emission cuts are needed in order to achieve long-term goals of keeping the increase of global temperatures well below 2°C (Haines, 2017). Given that Ontario is the second-largest driver of</p>

Reference in Proposed Environmental Plan	Staff Comments
	<p>emissions in Canada, this presents an obvious responsibility, and a tremendous opportunity, for Ontario to set leading target goals that not only help support Canada's commitment in the Paris Agreements, but also facilitate international leadership in a transformative, low carbon economy for the province.</p> <p>In addition to the proposed actions, the Environment Plan should consider implementing and/or expending on the following efforts that have been shown to be most effective in lowering GHG for Ontario (ECO, 2018):</p> <ul style="list-style-type: none"> ▪ <i>Focus on Improvements by Industry</i>, particularly the transportation sector that is responsible for majority of emissions (see page 36). ▪ <i>Strengthen and Improve Codes and Standards</i> (e.g. building codes, particularly within low-income communities). ▪ <i>Green Energy Act</i> (e.g. provincial and legislative guidance) ▪ <i>Better Rules on Land Use</i> (e.g. mandatory impact considerations on climate) ▪ <i>International Leadership</i> (e.g. committing to strong climate goals) ▪ <i>Climate Law</i> (e.g. Cap and Trade) – Ontario has and can further benefit from a “Polluter-Pay Carbon Pricing System” which is the most effective way of reducing GHG emissions (ECO, 2018). With the removal of the Ontario Cap and Trade Program, Ontario is again in need of a strong climate <i>law</i> that will positively contribute to the regulation and reduction of GHG emissions. <p>Given Ontario's large GHG emission rates, and following the recent actions to repeal efforts that were aimed at reducing GHG emissions (i.e. Cap and Trade), the province should do better. Shifting to “net-zero” emissions and green energy renewable paradigms are great (and much needed) examples of how our province can be a driving force for more sustainable and healthier living.</p>
We will create and establish emission performance standards to	This is very vague and needs to be further clarified. For instance, how will the standards be constructed? How are “large emitters” defined? How will other polluters

Reference in Proposed Environmental Plan	Staff Comments
achieve greenhouse gas emissions reductions from large emitters. Each large industrial emitter will be required to demonstrate compliance on a regular basis. The program may include compliance flexibility mechanisms such as offset credits and/or payment of an amount to achieve compliance. (p 26)	who may not classify as “large emitters” be accountable?
We also know that just over 60% of Ontario’s food and organic waste is sent to landfills. [...] When food and organic waste is sent to landfill, opportunities are lost to preserve valuable resources that could be used to heat our homes, support healthy soils and reduce greenhouse gas emissions. (p 31)	Should be improved by: <ul style="list-style-type: none"> • Including other implications of food loss/waste, such as the resources required to produce, harvest, process, package, transport, store, advertise, retail, etc.; and consumers’ money, time, and nutrition needs. • Acknowledging the complexities inherent to food waste, as evident by fact that while vegetables and fruit are the highest category of avoidable food waste, these are also one of the most under-consumed relative to dietary recommendations.
We will work with partners on ways to make it easier for residents and businesses to waste less food or reuse it for beneficial purposes such as compost. (p 31)	Should be improved by: <ul style="list-style-type: none"> • Differentiating between <i>food losses</i> (by food industry, typically defined as up to the activity of distribution) from <i>food waste</i> (most of which is generated by households/consumers). • Changing the perspective of food as just another commodity. Raise awareness of the important lack of realization that the biggest differentiator between profitable and non-profitable business is food losses (Dr. Martin Gooch, U. of Guelph, Policies, Practices and Partnerships: Reducing Food Waste Symposium, May 30, 2017) • Pointedly putting much more emphasis proportionately on prevention (waste less food) over diversion/recovery (re-use)
Quick Fact: About 60% of Ontario’s food and organic	While having merit as stated, this would be a better and more precise statement if it were revised to emphasize

Reference in Proposed Environmental Plan	Staff Comments
waste is sent to landfills which emits methane – a potent greenhouse gas – when it decomposes. Efficient diversion of household waste from landfills is an important tool in the fight against climate change. To read more about our plan to fight litter and waste, see page 40. (p 32)	prevention (waste less food) proportionately over diversion/recovery (re-use).
Increase the renewable content requirement (e.g. ethanol) in gasoline to 15% as early as 2025 through the Greener Gasoline regulation, and reduce emissions without increasing the price at the pump, based on current ethanol and gasoline prices. (p 33)	Clarification and considerations are needed as to whether this may have negative impacts on food production for humans, such as if production of other agricultural products are switched to growing corn for fuel purposes, thus impacting overall food systems.
Make climate change a cross-government priority (p 35)	The actions in this section could be enhanced by recognizing the importance of multi- and cross-sectoral, intra-governmental collaboration (encouraging broad stakeholder cooperation amongst governments, agriculture, environment, energy, water, health, education, civil society, and finance/economic sectors). Limitations on food industry lobbying is encouraged to avoid undue, biased influence on sustainability. Additionally, emphasised alignment is needed amongst health (nutritional, mental), social (affordability, acceptability, capabilities), economic (profitability) and ecosystem/environmental sustainability agendas (e.g. alignment with the national food policy/revised dietary guidance).
Encourage local leadership by forming stronger partnerships and sharing best practices with	The sharing of best practices could be strengthened by more research and evaluation.

Reference in Proposed Environmental Plan	Staff Comments
community groups and business associations. (p 37)	
<p>Increase opportunities for Ontarians to participate in efforts to reduce waste (p 39)</p> <p>Educate the public and business about reducing and diverting food and organic waste. (p 41)</p>	<p>This action - as well as broader agendas - would be much strengthened by being incorporated into a larger consumer-oriented strategy of Leverage Food Literacy Framework to Integrate Sustainability (see page 32)</p>
Develop best practices for safe food donation. (p 41)	<p>Indisputably, precautions are important for safe food, including for donating. However, reducing food waste and discouraging the overproduction of food should be top priority. It is also important to recognize that food donations do not address the root of the problem, which is income inadequacy.</p>

PUBLIC HEALTH AND EMERGENCY SERVICES – OMISSIONS AND ADDITIONAL OPPORTUNITIES

Omissions/Opportunities	Staff Comments
Need to consider the costs of negative externalities of the food system.	<p>There has been an increasing realization of the externalized costs that are generated by the food industry (Seed & Rocha, 2018). Instead of being accounted for in food prices, these costs typically have to be absorbed by ecosystems and by public systems such as health care. Examples of these costs include:</p> <ul style="list-style-type: none"> • Burden of chronic diseases from over-consumption of calories and unhealthy diets; • High use and depletion of natural resources across the food chain • Accumulation of harmful substances (contaminants, packaging, microorganisms, etc.) in the ecosystem (land, water, air)
Need to alter individual and population dietary choices and patterns, while still meeting food and nutrition needs.	<p>Consumption patterns that are unhealthy and impactful to the environment, are determined by the following factors:</p> <ul style="list-style-type: none"> • Inadequate incomes - Poverty means inadequate household-level incomes to afford eating patterns consistent with a sustainable diet. Well-intended but erroneous food-based responses do not address the root cause of food insecurity. • Societal reprioritization and devaluation of food-related activities, • Attitude that we can afford to waste food because it is cheap (Dr. Martin Gooch, U. of Guelph, Policies, Practices and Partnerships: Reducing Food Waste Symposium, May 30, 2017). Points to the widespread need to re-develop food literacy. • Un/under-regulated marketing of foods, particularly of ultra-processed foods to children <p>Consumption patterns should be based on a “win-win” principle that healthy dietary patterns can be balanced for improvements in environmental sustainability, with socially-beneficial, economically-viable food system designs.</p> <ul style="list-style-type: none"> • Sustainable diets are protective and respectful of biodiversity and ecosystems, culturally acceptable, accessible, economically fair and

Omissions/Opportunities	Staff Comments
	<p>affordable; nutritionally adequate, safe and healthy; while optimizing natural and human resources (FAO, 2010).</p> <ul style="list-style-type: none"> • Include as corollaries that there isn't a need to avoid any food category entirely (such as meats), and that the traditional advice about eating a wide variety of foods remains valid
<p>Consider the <i>Consumer Strategy: Leverage Food Literacy Framework to Integrate Sustainability</i></p>	<p>Promote, support, and resource opportunities to learn, practice, and teach Food Literacy:</p> <ul style="list-style-type: none"> • Fostering a culture of valuing and prioritizing food, and having a healthy relationship with it (food as a precious resource) • Understanding where food comes from and what it takes for food to be available to all people • Knowing how to plan, prefer, grow/produce, access, prepare, serve, save, re-purpose/prevent waste, and store safe and healthy foods • Appreciating the relationships of food to your health, food systems, and socio-cultural, economic, and physical environments
<p>Promote "Circular Economies".</p>	<p>An economic model that minimizes the use of raw materials, maximizes the useful life of materials through resource recovery, and minimizes waste generated at the end of product life - rather than a traditional linear economy. Such model could be effective is supporting the prevention and reduction of food waste. This further supports a shift from perceiving food as just another commodity, especially among industries.</p>
<p>Need for Research and Evaluation</p>	<p>Encourage and support research and evaluation to:</p> <ul style="list-style-type: none"> • <u>Investigate and develop a holistic approach</u> that integrates health, social, and economic agendas with environmental sustainability • <u>Conduct community food assessments</u> to identify opportunities, needs, gaps, and threats to the integration of food literacy and food systems, with environmental sustainability • <u>Understand food loss/waste</u> causes and amounts all across the food value chain. For example, audits can provide data for developing, implementing, and evaluating the effectiveness of loss/waste reduction intervention to determine best practice. Further exploration of consumer food attitudes and practices

Omissions/Opportunities	Staff Comments
	are needed, especially to inform reduction of household-level food waste
NRPH requests additional and more explicit action to be taken to address the growing emissions produced through the transportation sector in the Environmental Plan.	<p>In recognizing that the transportation sector is Ontario's fastest growing and largest source of emission, more focus is needed for strategies to address this growing concern. As it currently stands, the Environmental Plan has very limited mention of actions to address the energy use and emissions produced from the transportation sector. Aside from the limited actions mentioned on <i>heavy-duty</i> vehicles (pp.10, 33), <i>electric vehicles</i> (EV) (p. 23), compressed <i>natural gas</i> (p. 23) and <i>public transportation</i> (p. 38), there is no direct mention of addressing the issue of on-road passenger emissions – which accounts for most of the emissions (ECO, 2018). Moreover, the few actions that are outlined, the plan does not provide any detail as to how these actions will be achieved. For instance, the plan commits to an uptake of EV, but it is unclear on how the province plans to tackle this. Clarity on this issue is particularly needed to be addressed, especially given the recent removal of EV vehicle and charging incentives by the cancellation of the Cap and Trade Program.</p> <p>Not only is the transportation sector our largest source of emissions (38%) and is steadily growing (34% increase since 1990), its impacts heavily outweigh our existing efforts to reduce emissions (ECO, 2018). For example, the plan reports on the province's success in reducing the emissions in the electricity sector by the phasing out of coal-powered electricity generation in stating that "<i>Ontario's low-emission combination of hydroelectric, nuclear, natural gas and non-hydro renewable generating capacity has enabled the province to avoid up to 30 megatonnes of annual greenhouse gas emissions, equivalent to taking up to 7 million vehicles off the road</i>" (p. 7). Given that there are roughly around 730 million cars annually on the road (just considering the major highways in the Greater Toronto and Hamilton Areas (GTHA)), the reduction mentioned in the plan accounts for less than 1% of the Ontario's emissions challenge presented from the transportation section (AADT, 2016). As such, this highlights a huge opportunity for further reduction of</p>

Omissions/Opportunities	Staff Comments
	<p>GHG by focusing on the transportation sector. Although we agree that Ontario's role in reducing electricity emissions has definitely been a great step in the right direction, we hope that this example will emphasize that more action is urgently needed to address the emissions produced in the transportation sector:</p> <p><i>Electricity Sector:</i> Ontario's low-emission combination of hydroelectric, nuclear, natural gas, and non-hydro renewable generating capacity = saving of 30 megatonnes of GHG/year = 7 million vehicles.</p> <p><i>Transportation Sector:</i> <u>Approximately</u> 730 million vehicles/year (in GTHA) = 3, 128.6 megatonnes/year Electricity sector equates to approximately 0.9% of the emissions produced by the transportation sector.</p> <p>NRPH is glad that Ontario has expressed commitment for the protection of air quality and the recognition of the public health threat that air pollution has on population wellbeing. The World Health Organization (WHO) estimates that air pollution is responsible for approximately 7 million deaths per year worldwide (1 in 8 deaths) (WHO, 2016). A major contributor to poor air quality is the transportation sector. Not only does transportation affect the quality of the surface ozone, but it is also the direct cause of particulate matter (PM)_{2.5} – exposure to which pose serious concerns for the health of our vital organs such as lungs and heart (WHO, 2016). Additionally, our dependence on driving has been linked to obesity, stress, insufficient sleep and physical activity – all of which significantly increase risk of chronic disease (Ding et al., 2014). So if Ontario is really serious about protecting air quality and benefiting human health and the environment, it is imperative to have more direct action in the Environment Plan on addressing the increasing trend of personal vehicle dependency for transportation.</p> <p>One specific strategy that is overlooked in the Plan that could effectively address the transportation sector issue is the promotion and support of active transportation. This strategy would not only address Ontario's transportation emission challenges but also tackle some of the more serious public health priorities. We know that</p>

Omissions/Opportunities	Staff Comments
	<p>the majority of reported emissions from the transportation sector are attributable to on-road passenger vehicles used for commuting, and continue to grow (ECO, 2018). As such, addressing the commuting issue through the promotion of active transportation has been a leading practice with notable results across the globe. Creating more opportunity for Ontarians to choose walking, biking and/or public transportation over driving presents a significant cost saving strategy across all sectors of health, infrastructure, transit and more.</p> <p>The Plan may choose to draw inspiration from the following successful examples from other cities and regions that have committed to and adopted active travel as the leading mode of travel - Our Commitment to Green and Healthy Communities: Fossil-Fuel-Free Streets Declaration.</p>
<p>The province of Ontario must commit to enhancing the public's understanding of the significant health impacts of climate change, along with other implications in their community, in order to successfully build Ontario's resilience to climate change.</p>	<p>NRPH is pleased with Ontario's commitment to help Ontarians understand the impacts of climate change (p. 19), however, we urge that explicit action is taken to increase the public's awareness of the climate change impacts on population health and wellbeing. Research suggests that although a majority of the public may be aware to some degree of the emerging serious issue of climate change, there is actually only a few who understand the significant implications that climate change has on their <i>health</i> (Maibach, 2011). This knowledge gap has been shown to be a great barrier to an individual's connection with the climate change issue, as it reinforces perceptions of climate change as a distant, impersonal issue.</p> <p>In fact, climate change effects on personal health are very current, well documented, and projected to increase substantially. Climate change is highly regarded as the "Defining Public Health Issue for the 21st Century" (Dr. Margaret Chan, the former Director-General of the WHO). IPCC has additionally reported how climate change, in a very current and near term, will further exacerbate existing health problems (2018). As such, this will ultimately further contribute to loss of work, decrease in labor productivity and reduced economic prosperity. Therefore, public health can and</p>

Omissions/Opportunities	Staff Comments
	<p>should play a key role in supporting the efforts in addressing the issue of climate change, and consequently outcomes affecting health.</p> <p>NRPH is happy that the province is open to collaborating with public health units (as referenced on page 10) but further urges for this support to go beyond air pollution, and recognize the multiple health implications of climate change. Here is a <i>brief</i> outline of the existing and projected climate-related risks, and their impact on health:</p> <ul style="list-style-type: none"> • Ontario is expected to experience an increase in temperatures by 2.5°C by 2050, if significant efforts are not met. Hotter temperatures can lead to serious health implications such as heat exhaustion and heat stroke, worsening of cardiovascular, respiratory and chronic kidney disease, increased ozone air pollution, and changes in vector-borne disease distribution (such as Lyme Disease and West Nile), prolonged risk of droughts and quality of water supply, as well as all the negative mental health implications that are associated with any and all of those risks (WHO, 2018) • Changing climate also increases risk of more frequent extreme weather events to impact Ontario, similar to the already seen wind and snow storms, and even the potential of severe tornadoes (such as those that have devastated Ottawa just this past year). More frequent extreme weather and changes in precipitation significantly increase the risk of flooding (as well as the risk of injury and deaths associated with it), damage to infrastructure including homes and hospitals, as well as devastating impacts on the harvest and food production for the local agricultural communities (WHO, 2018). <p>At this time, the Environment Plan does not include any mention of how the current and projected changes in our climate are impacting the health of our communities, and how these impacts are expected to worsen. This can be rectified in the plan by recognizing the direct connection between health and climate change, and explicitly addressing it in the plan.</p>

Omissions/Opportunities	Staff Comments
	<p>It is also important for the province to consider and acknowledge the direct benefits to health that will arise from mitigation efforts taken on climate change. Policies and actions that reduce greenhouse gas emissions can also bring about important corollary benefits, or “co-benefits”, to population health (Haines, 2017). In other words, the investments we make to transition to a low-carbon economy today, as supported by a strong action plan, will not only have a positive impact on reducing GHG emission levels which will ultimately result in more positive health outcomes, but such investments can also have direct and timely benefits to health as a whole. For example, our commitment to the promotion of active transportation does not only reduce GHG emissions but increases opportunity for physical activity, social connectedness and improvements in air quality to support respiratory and cardiovascular health. Thus, we don’t need to wait on GHG emissions reductions to take place before we are able to experience health benefits, while we work on long-term solutions towards larger climate issues.</p> <p>A good starting point to addressing climate change is by better understanding the current and future impacts on communities. That is why NRPH is pleased with Ontario’s intentions to “undertake a provincial impact assessment to identify where and how climate change is likely to impact Ontario’s communities, critical infrastructure, economies and natural environment” (p. 19). While a provincial assessment is an important tool, it is essential that the information collected and disseminated be made at a local municipal and regional levels. Although the impacts from the changing climate are experienced across the province, what those impacts translate to will vary largely due to the geographical regions. As such, the provincial government should draw support and collaborate with local municipalities who have already begun to do great work in assessing climate change impact. Additionally, based on the rationale above, it is important for the plan should commit to specifically completing a Climate Change and Health Vulnerability Assessment to better understand the impacts of climate variability on health and identify strategies to reduce those risks. The</p>

Omissions/Opportunities	Staff Comments
	<p>province should lean on the guidance from the Environmental Health Climate Change Framework for Action when considering actions. Given that the health of our populations is at the core of our productive and sustainable society, further understanding of climate change impacts on health is key.</p> <p>The most recent Lancet report has concluded that the climate change impacts on health are unequivocal and potentially irreversible. As such, urgent action is needed in order to do something about this and it should start with explicit recognition of the health implication of climate change for the public.</p>
<p>NRPH urges for further effort to be shifted towards more explicit actions that supports Ontario's most vulnerable populations.</p>	<p>Actions to consider and support Ontario's most vulnerable populations is another significant gap in the Environment Plan as it currently stands. The Environment Plan needs to explicitly recognize that not everyone will be impacted equally by the changing climate and develop appropriate action that focus on building resilience of the most vulnerable communities. Those populations who experience poverty and homelessness, who are living with low income and lack access to homes that can shelter against flooding or extreme heat, and populations who are elderly, young and living with pre-existing health conditions are at a much greater risk of negative health outcomes that are expected as a result of climate change. These communities are much more vulnerable to the impacts expected from climate change, however very little has been referenced in the plan to explain how such concerns may be addressed.</p> <p>Not only does climate change pose a significant threat to the vulnerable population, but is expected to also exacerbate the inequities that are already experienced within these communities, such as less access to healthy foods, green spaces and job security (BARHII, 2015). For example, a large portion of individuals who experience homelessness tend to reside in inner-city neighbourhoods that are more prone to extreme heat exposure through the Urban Heat Island effect with limited means for support – as such, these individuals experience a much greater risk of harm and potential loss of life.</p>

Omissions/Opportunities	Staff Comments
	<p>The degree of population's vulnerability is largely affected by policies associated with socioeconomic factors such as city design, infrastructure services and health care systems. The Environment Plan has an important role to play in ensuring that there are actions put in place to reduce risk to health and equity impacts resulting from climate change. The Environment Plan may consider specific actions such as investments in the building and housing quality, increased trees and green spaces and better street designs within lower-income neighbourhoods.</p> <p>"The true measure of any society can be found in how it treats its most vulnerable members" – Mahatma Gandhi</p> <p>Evidence informed practices and initiatives, such as the Urban Climate Change Research Network, urge that in order to have an effective climate change action, the focus must be to the most vulnerable populations (2015). In order for Ontario to have a strong and effective climate action plan, the Environment Plan has to better align resilience building within communities that experience highest vulnerability to the current and future challenges faced in our changing climate.</p>

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Subject: Q1 Economic Development Quarterly Update Report

Report to: Planning and Economic Development Committee

Report date: Wednesday, April 17, 2019

Recommendations

That Report ED 4-2019 **BE RECEIVED** for information.

Key Facts

- Economic Development provides quarterly updates to the PEDC. The purpose of this report is to provide the PEDC with an update on the department's activities for the first quarter (Q1) 2019.
- Economic Development activities take place within four main function areas: Trade and Investment; Expedited Services for Business; Strategic Economic Initiatives and Strategic Marketing Initiatives.
- Implementation of the five-year Economic Development Strategy 2019-2024 is underway and initial reporting will be included in the Q2 report.

Financial Considerations

The activities described in this report have been accommodated within the approved 2019 Economic Development Department budget.

Analysis

This is the economic development quarterly update for the Planning and Economic Development Committee and covers work carried out during the first quarter (Q1) 2019.

1. Trade and Investment

The Manager, Trade & Investment is responsible for delivering an Annual Work Plan, within a prescribed budget, that supports the Niagara Economic Development (NED) team's efforts to secure Foreign Direct Investment (*FDi*) for the Niagara Region; promote business attraction opportunities in designated key, highest *FDi*-probability markets, the United States, United Kingdom and Europe; respond to queries from other global markets; champion key economic sectors in the Region, participate in trade shows on behalf of the Niagara Region, and independently, involve Niagara economic growth stakeholders (e.g., Niagara Development Corridor Partnership Inc. (NDCPi), Niagara Industrial Association (NIA), TEAM Niagara, the Chambers of Commerce and others) where possible.

Note: Q1 is traditionally a preparation period for organizing the groundwork for outgoing Q2 FDI missions in the Trade & Investment portfolio, typically involving the awarding of Qualified Lead Generation Contracts in the target markets. Thus, the emphasis in this period of the calendar is to contract the Qualified Lead Generation firms; and, produce a comprehensive plan for TEAM Niagara to undertake the first of two annual Canadian Consular visits in Niagara's neighbouring target states for FDI and Trade.

- a. Inward Missions Q1:
 - Australian-based IT Company considering Niagara for a North American operating base location.
- b. Outward Missions Q1:
 - Hamilton-Niagara Partnership Mission to Mexico City and Guadalajara: 12 business meetings; 2 with consortia (*IJALTI* with 137 IT members; and, *AMITI* with 315 ICT members).
 - Economic Developers Council of Ontario, Annual Meeting, Toronto.
 - Automotive News-APMA Canada Congress, Toronto.
 - Meetings with the Senior Trade Commissioners in the Colombian and Costa Rican Consulates, Toronto.
 - Eight U.S. Qualified Lead Meetings in Pennsylvania, Minnesota, Ohio and Western New York.
 - Food Manufacturer, Richmond Hill.
- c. Leads Generated, Q1: 22 companies/organizations
- d. Leads to Date, 2019: 22 companies
- e. Active Prospects, 2018 ongoing: 48 companies

2. Niagara Foreign Trade Zone (NFTZ)

The Niagara Foreign Trade Zone point is now established and servicing more than 65 clients. Contact was made with 160 firms and 13 institutions within an active database of 400 firms, 11 NFTZ seminars were conducted and the Manager participated in 20 networking events. NFTZ clients/prospects represent the agribusiness, manufacturing, and logistics sectors.

To date the Canada Border Services Agency has processed approximately \$102,600.00 in Duties Relief (K90) claims and \$178,366.00 in Duty Drawback (K32) claims, for Niagara based claimants. These amounts do not include the new surtax relief.

NFTZ clients have received export-related support, through customized services and education on the Federal FTZ programs and services. This information helps them successfully enter into new markets by identifying specific incentives, export-related financing and risk mitigation as well as providing assistance to resolve the impact of the new surcharge and its remission procedure.

a. Business Strategy Plan

- The implementation of the NFTZ Business Strategy started in Q1. The Strategy is based on the draft report developed by consultants E&Y in the Fall 2018.
- The Strategic Plan focuses on target prospects through an outreach strategy.
- Activity has been focused on Business Retention and Expansion by providing our exporting firms in Niagara with information and relevant contacts through a 'single contact point.'
- Support has been provided to NED's FDI attraction research, lead development, trade missions and strategy development.

b. Business Outreach Program

- The 65 clients of the NFTZ were surveyed to identify their exporting needs and assess NFTZ services.
- The prospect database of 400+ companies was revisited.
- The scheduling of a series of NFTZ seminars for 2019 is in progress. An agenda including a working session with Task Force members, country insights and issue-based sessions are highlights of the next series.
- Work with 15 clients has been completed.

c. Networking and Relationship Building

- Attended six networking events including: the Prospectors and Developers Association of Canada (PDAC) 2019 where meetings were held with Canadian Trade Commissioners; Post-Brexit trade; UN Procurement for international suppliers; Netherland Investment Authority; NIA and the Southern Mayors' luncheon.
- Provided updates to our clients on 'Regional Economic Growth through Innovation – Steel and Aluminum' Federal Initiative. Two clients have expressed their interest in this program.

d. Supporting the NFTZ Taskforce

- Moderated a session at an event organized by Transport Canada, 'Increasing and Diversifying Exports through E-commerce' focused on the Hamilton Niagara area. Identified and invited clients to participate in the session.

- e. Administrative Update
 - Provided updates to Niagara Development Corridor Partnership Inc. (NDCPi) meetings held in February and March 2019. (NED has subcontracted the day to day operations of the NFTZ to the NDCPi).
- f. Marketing Tools
 - Working with NED to develop a CRM tool to include NFTZ clients.
 - Proposed NFTZ news within the Region's e-newsletter.

3. Expedited Services for Business

The Manager, Business Development and Expedited Services acts as a formal liaison between investment/development stakeholders, existing businesses, local municipal staff and stakeholders, and Regional staff in site selection, investment due diligence and planning policy support and interpretation. Beyond this core function, this role manages a number of project-based initiatives.

- a. Site Selection Support
 - In the first quarter of 2019 we received five qualified requests for site selection support. This has resulted in one request for additional information.
 - In partnership with the City of St. Catharines successfully relocated one business to the Niagara region.
 - Facilitated a second site tour of a food processing company that has short-listed Niagara for a second location.
 - The Niagara Region and Local Area Municipalities are working with the St. Lawrence Seaway to investigate opportunities for the development of new employment lands.
- b. Industrial DC Grant Program
 - In the first quarter of 2019 Niagara Region received a total of four Industrial Grant Applications.
 - The industrial development charge grants will support approximately \$15.3 million in new construction.
 - The economic impact will result in the creation and/or retention of an estimated 88 jobs.
- c. Gateway Economic Zone & Centre CIP Incentives Program
 - In the first quarter of 2019 no new Gateway CIP applications have been received.
 - Three legal agreements for previously approved Gateway CIP applications were created and distributed.

4. Strategic Economic Initiatives

The key focus of this area involves taking a longer-term view of the work of the economic development department and how it can support growth within the regional economy. This involves strategy development, partnerships, securing external funding and awarding grants.

a. Industry Partnerships

- An agreement to provide funding to Innovate Niagara for 2019 is being developed, similar to previous years and including performance metrics. The final report for 2018 is included below.

INNOVATE NIAGARA 2018		
2081 Goals	2018 Results	
Work with 18 high performing companies	Innovate Niagara staff have worked with 24 new high performing companies	
Organize and partner on 35 events reaching 1,700 people	Innovate Niagara staff organized and partnered in 38 events reaching 1,596 people.	
Meet 120 new clients	Innovate Niagara staff met with 107 companies	
Create 30 new full-time jobs	Innovate Niagara has helped create 50 jobs, full-time and interns	
RENEW ALL EXISTING AND ADD NEW MOUs	EXPIRATION	PROGRESS
DSBN	Dec 31, 2019	Up-to-date
VRIC	Sept 14, 2020	Up-to-date
CIO Consortium	March 31, 2017	In Progress
Brock University	March 31, 2019	Up-to-date
Niagara College Research and Innovation	March 31, 2019	Up-to-date
43North	New Opportunity	Draft proposed

b. Funding Partnerships

- An Invest Canada Communities Initiative (ICCI) funding application has been approved for NED activities in 2019. The funding will provide 50% of the total project cost for two lead generation initiatives, as well as purchasing research data and conducting analysis. Funding to develop a promotional video for the Hamilton-Niagara Partnership, has also been approved.

- NED has entered into the second year of a two-year agreement with NDCPi to run the day-to-day operations of the NFTZ and based on successful 2018 results, the funding transfer was made in Q1. NED retains strategic oversight.

c. Planning and Strategy

- Development of a five year Economic Development Strategy was completed during Q1 and it was presented to the Planning and Economic Development Committee on March 20th. The strategy addresses the immediate issues of stakeholders across the region, which were identified during extensive stakeholder consultations in 2018. The objective going forward is to re-visit the development of a longer-term plan in collaboration with partners, to achieve a vision of the region in a 20-year time-frame. Implementation of the five-year strategy has started and a report on progress will be included in the Q2 Economic Development Quarterly Update report, in July 2019.
- An 'Expression of Interest' application has been developed and was submitted to the Federal Government's National Trade Corridor Fund in March 2019. The submission was led by the Public Works Department and supported by Economic Development.

5. Market Intelligence and Data Collection (Manager, Research and Analysis)

NOTE: The following information includes research, analysis and information provision to support investment, business development and site selection opportunities for Niagara Region among both internal (regional and local municipal) and external (business) clients of Niagara Economic Development.

Economic Research and Analysis

- Completed and disseminated Niagara Tourism Profile.
- Formalized research partnership with Niagara Community Observatory to produce economic policy briefs.
- Updated Niagara major investment database with final 2018 information.
- Completed trade research for National Trade Corridor Fund application.
- Provided economic development success information for State of the Region Address.
- Provided key economic indicators for Niagara Region's Budget Summary for 2018.

6. Strategic Marketing

The focus of strategic marketing is to support broader awareness of Niagara and improve overall business attraction and resident attraction.

a. Marketing Planning & General Activity

- Marketing Plan for 2019 developed, with a focus on developing marketing capabilities, engaging in consistent marketing activity, and building up local networks and community.
- RFP in development to engage with a Marketing Agency of Record to assist with establishing consistent marketing activity vs. individual project work.
- Social media accounts on Twitter and LinkedIn launched in January, with ongoing and consistent activity established.
- Stakeholder feedback received on Welcome Niagara Canada website through a survey, and focus groups with newcomers to Niagara. Feedback will be integrated into website updates that will continue to optimize usability and content.
- New marketing assets developed, including new business cards, USB keys and Passport promotional piece. New ad copy and templates are in development, as well as promotional banners.

b. CRM Development

- Decision made to proceed with Index RSM platform. Developed a comprehensive needs analysis document to identify and prioritize key needs for the team.
- Currently working with Innovate Niagara on technical updates to the system.

c. Media & Thought Leadership

- Tourism Profile was launched with a press release, blog post and social media promotion. Media coverage included a 10-minute interview on CKTB 610 on March 7, and a 2m 30s segment on CHCH Evening News on March 8.
- Radio Roundtable sponsorship confirmed with CKTB 610 for May 31st. This will be the first roundtable held at the Region.

d. Hamilton- Niagara Partnership

- New promotional video supporting the partnership is in development.

7. Economic Development Officer

The principle focus of the work of the Economic Development Officer is to provide support to the Local Area Municipalities that do not have economic development staff.

These municipalities are Grimsby, Niagara-on-the-Lake, Pelham, Thorold, Wainfleet and West Lincoln. In addition, the development of the Agribusiness and Tourism sectors are also a focus of the Economic Development Officer.

a. Stakeholders

18 outreach meetings with 14 different stakeholders.

b. Tourism

26 meetings with eight different stakeholders.

Examples include:

- Brock Sports Tourism Report meetings – project scoping and introductions to industry and stakeholders.
- Canada Summer Games meetings – RFP distribution, Municipal Forum attendance, etc.
- Metrolinx summer schedule adjustments – connecting with tourism industry to determine adjustments to summer 2019 schedules and proposed initiatives for summer/fall extended service.
- Municipal airports – development meetings and RFP for future business modelling.
- Circulating Tourism Profile to industry stakeholders and advising on its use in grant applications and business planning.
- Tourism research involvement – discussions with Brock researchers, potential future sport event bids.

c. Agri-business

14 meetings with seven different stakeholders.

Examples include:

- Irrigation strategy next steps – meetings with local area municipalities to explore new funding applications.
- Agriculture Funds meetings with Niagara North and Niagara South Federations of Agriculture.
- Ontario Federation of Agriculture/OMAFRA webinar attendance – use of agricultural data for support Economic Development, Agriculture Economic Development manual.
- Farmland Success Stories presentation at 2019 Farmland Trust Forum conference.
- Meeting with Ontario Federation of Agriculture to discuss advocacy in natural gas extension in rural areas.
- Promotion of OMAFRA and CFDC grocery retailer events – connecting Niagara agribusinesses to retail connections to expand their operations.
- Update on the agriculture asset map, information completed through the Golden Horseshoe Food and Farming Alliance.

d. LAM development:

36 meetings with seven municipalities.

- Five client/site visits and six site selection inquiries.
- Includes meetings with more than 14 private-sector businesses on expansion/investment and multiple meetings with LAM Economic Development committees.
- Work includes: Review and approval of LAM video; FDI information session and outreach meetings; Economic Development strategy review and comments; Development Charge/Incentive Program information sessions.
- Research and information requests: 148 requests.

Alternatives Reviewed

None applicable.

Relationship to Council Strategic Priorities

Economic development activities described in this report directly support three of Council Strategic Priorities:

- Fostering innovation, investment and entrepreneurship
- Building a labour-ready workforce
- Positioning Niagara globally

Other Pertinent Reports

ED 1-2019 Economic Development Overview
ED 2-2019 Economic Development Strategy

Prepared and Recommended by:

Valerie Kuhns
Acting Director
Economic Development

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was prepared in consultation with and reviewed by Valerie Kuhns, Acting Director Economic Development.

In accordance with the notice and submission deadline requirements of Sections 18.1 (b) and 11.3, respectively, of Niagara Region's Procedural By-law, the Regional Clerk received from Councillor Redekop a motion to be brought forward for consideration at the April 25, 2019 Council meeting respecting Community Improvement Plan Areas Eligible for 2019 Smarter Niagara Incentive Program Funding.

1. That staff **BE DIRECTED** to consider eligible requests for Regional matching funding for Smarter Niagara Incentive Program simple grants (Environmental Assessment Study Grant, Building and Façade Improvement Grant/Loan, Residential Grant/Loan, Heritage Restoration and Improvement Grant/Loan, Planning Studies Grant) for 2019 in all locally approved or revised Community Improvement Plans (CIP) (and/or CIPs locally approved or revised until December 31, 2019), as per existing program budget and parameters; and
2. That staff **PREPARE** a report for the Planning and Economic Development Committee meeting being held on May 8, 2019 that outlines the financial implications of tax related grants under Community Improvement Plans (CIP) and the Regional grant and incentive programs.

In accordance with the notice and submission deadline requirements of Sections 18.1 (b) and 11.3, respectively, of Niagara Region's Procedural By-law, the Regional Clerk received from Councillor Fertich a motion to be brought forward for consideration at the April 25, 2019 Council meeting respecting Discussion of Provincial Review of Regional Government.

Whereas on January 15, 2019, the Provincial Government announced it would be undertaking a review of the province's Regional governments;

Whereas Correspondence Item COTW-C 02-2019 respecting Provincial Review of Regional Government provided information that the local area mayors and Chief Administrative Officers have collaborated on an action plan related to the review;

Whereas it is important that Regional Councillors also have an opportunity to provide input on this review.

NOW THEREFORE BE IT RESOLVED:

1. That Regional Council **BE PROVIDED** with an opportunity to have a fulsome discussion respecting the Provincial Review of Regional Government; and
2. That staff **BE DIRECTED** to include the topic of Provincial Review of Regional Government on the agenda for the Committee of the Whole meeting being held on May 2, 2019.

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. <>

A BY-LAW TO ACCEPT, ASSUME AND DEDICATE
PART OF LOT 23, CONCESSION 3, IN THE CITY OF ST. CATHARINES
AS PART OF REGIONAL ROAD NO. 38 (MARTINDALE ROAD)

WHEREAS it is in the interest of Council for The Regional Municipality of Niagara to accept a road widening from Niagara North Condominium Corporation No. 38;

WHEREAS it is deemed expedient to accept, assume and dedicate the lands hereinafter described as part of the public highway being Regional Road No. 38 (Martindale Road);

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That the following land be and the same is hereby accepted, assumed and dedicated as public highway forming part of the said Regional Road No. 38 (Martindale Road):

Part of Lot 23, Concession 3 in the former Township of Grantham, now City of St. Catharines, Regional Municipality of Niagara designated as Part 2 on Reference Plan 30R-14697.

2. That this by-law shall come into force and effect on the day upon which it is passed.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed: < >



Niagara North Condominium No. 38



ILLUSTRATION SHOWING APPROXIMATE LOCATION OF ROAD WIDENING ALONG REGIONAL ROAD No.38 (MARTINDALE ROAD) AT HANNOVER DRIVE CITY OF ST. CATHARINES

SCALE = 1:1,000 0 10 20 40 Metres

LEGEND:

-  - DENOTES TERANET MAPPING
-  - DENOTES SUBJECT LANDS

The proposed widened limit has been compiled from office records.

The final extent of the widening will be established through field survey by an Ontario Land Surveyor.

DISCLAIMER

This map was compiled from various sources and is current as of 2018

The Region of Niagara makes no representations or warranties whatsoever, either expressed or implied, as to the accuracy, completeness, reliability, and currency or otherwise of the information shown on this map.

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Niagara Region

IT Solutions
Surveys & Property Information
IR-19-126 Date: 2019-04-08

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. <>

A BY-LAW TO ACCEPT, ASSUME AND DEDICATE
PART OF LOT 45 CP PLAN 5, IN THE CITY OF ST. CATHARINES
AS PART OF REGIONAL ROAD NO. 48 (NIAGARA STREET)

WHEREAS it is in the interest of Council for The Regional Municipality of Niagara to accept a road widening from 766298 Ontario Inc.;

WHEREAS it is deemed expedient to accept, assume and dedicate the lands hereinafter described as part of the public highway being Regional Road No. 48 (Niagara Street);

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That the following land be and the same is hereby accepted, assumed and dedicated as public highway forming part of the said Regional Road No. 48 (Niagara Street):

Part Lot 45, Corporation Plan 5, former Township of Grantham, now City of St. Catharines, Regional Municipality of Niagara designated as Part 3 on Reference Plan 30R-15309.

2. That this by-law shall come into force and effect on the day upon which it is passed.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed: < >



**ILLUSTRATION SHOWING APPROXIMATE LOCATION OF ROAD WIDENING
ALONG REGIONAL ROAD No.48 (NIAGARA STREET)
TOWN OF NIAGARA ON THE LAKE**

SCALE = 1:1,000 Metres

LEGEND:

- DENOTES TERANET MAPPING
- DENOTES SUBJECT LANDS

The proposed widened limit has been compiled from office records.
The final extent of the widening will be established through field survey by an Ontario Land Surveyor.

DISCLAIMER

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IT Solutions
Surveys & Property Information
IR-19-112 Date: 2019-04-01

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. <>

A BY-LAW TO ACCEPT, ASSUME AND DEDICATE
PART OF TOWNSHIP LOT 76, PART OF THE ROAD ALLOWANCE BETWEEN
TOWNSHIP LOTS 73 & 74, PART OF THE ROAD ALLOWANCE BETWEEN
TOWNSHIP LOTS 74 & 76, IN THE CITY OF NIAGARA FALLS
AS PART OF REGIONAL ROAD NO. 57 (THOROLD STONE ROAD)

WHEREAS it is in the interest of Council for The Regional Municipality of Niagara to accept a road widening from:

1939522 Ontario Limited as in the firstly and secondly described parcels;

Cytec Canada Inc. as in the thirdly described parcel; and

Ontario Power Generation Inc. as in the fourthly described parcel

WHEREAS it is deemed expedient to accept, assume and dedicate the lands hereinafter described as part of the public highway being Regional Road No. 57 (Thorold Stone Road).

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That the following lands be and the same are hereby accepted, assumed and dedicated as public highway forming part of the said Regional Road No. 57 (Thorold Stone Road):

Firstly:

Part of Township Lot 76, former Township of Stamford, now City of Niagara Falls, Regional Municipality of Niagara and designated as Part 8 on Reference Plan 59R-14265.

Secondly:

Part of Township Lot 76 and part of the Road Allowance between Lots 73 and 74 (as closed by unregistered Bylaw #2), Part of the Road Allowance between Lots 74 and 76 (as closed by Bylaw ST19864), former Township of Stamford, now City of Niagara Falls, Regional Municipality of Niagara and designated as Part 41 (surface rights only) and Part 45 on Reference Plan 59R-14265, Save and Except Parts 5 & 7 on 59R-15336.

Thirdly:

Part of Township Lot 76 and part of the Road Allowance between Lots 74 and 76 (as closed by Bylaw ST19864), former Township of Stamford, now City of Niagara Falls, Regional Municipality of Niagara and designated as Parts 5 and 7 on 59R-15336.

Fourthly:

Part of Township Lot 76, former Township of Stamford, now City of Niagara Falls, Regional Municipality of Niagara and designated as Part 1 on Reference Plan 59R-14211.

2. That this by-law shall come into force and effect on the day upon which it is passed.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair



Ann-Marie Norio, Regional Clerk

Passed: < >



**ILLUSTRATION SHOWING APPROXIMATE LOCATION OF AREA FOR ROAD DEDICATION
FOR REGIONAL ROAD No 57 THOROLD STONE ROAD
CITY OF NIAGARA FALLS**

LEGEND:

-  - DENOTES TERANET MAPPING
-  - DENOTES AREA FOR ROAD DEDICATION

CAUTION:

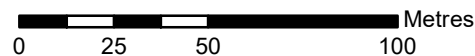
- This is not a Plan of Survey
- The area limits have been compiled from office records .

DISCLAIMER

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as to the accuracy, completeness, reliability, and currency or otherwise of the information shown on this map.
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SCALE = 1:2,000



**Public Works/Transportation Services
Surveys & Property Information
IR-19-111 Date: 2019-04-02**

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. < >

A BY-LAW TO AMEND BY-LAW 120-2010, THE PROCEDURAL BY-LAW

WHEREAS subsection 238(2) of the *Municipal Act, 2001*, S.O. 2001, Chapter 25, as amended, provides that every municipality shall pass a procedure by-law for governing the calling, place and proceedings of meetings; and

WHEREAS Regional Council deems it advisable to amend Section 9 of By-Law 120-2010, The Procedural By-Law;

THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That the Section 9 of By-law 120-2010 be amended to read:

9. PUBLIC ACCESS TO MEETINGS

9.8 A meeting of part of a meeting shall be closed to the public if the subject matter being considered is:

- (a) a request under the Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c. M.56, if Council is designated as head of the institution for the purposes of that act; or
- (b) an ongoing investigation respecting the municipality, a local board or a municipally-controlled corporation by the Ombudsman appointed under the Ombudsman Act, an Ombudsman referred to in subsection 223.13(1) of the Municipal Act, 2001, or the investigator referred to in subsection 239.2(1) of the Municipal Act, 2001.

2. That this by-law shall come into force and effect on the day upon which it is passed.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed: _____ by a vote of 2/3 of the members present

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO.

A BY-LAW TO SET TAX RATIOS AND TAX RATE REDUCTIONS FOR
PRESCRIBED PROPERTY SUBCLASSES FOR REGIONAL PURPOSES AND
AREA MUNICIPAL PURPOSES FOR THE YEAR 2019

WHEREAS pursuant to Section 308(5) of the *Municipal Act, 2001*, S.O. 2001, c. 25, as amended (referred hereinafter as “the *Municipal Act, 2001*”), The Regional Municipality of Niagara (referred hereinafter as “The Regional Corporation”) may establish the tax ratios for The Regional Corporation and the Area Municipalities;

WHEREAS the tax ratios determine the relative amount of taxation to be borne by each property class;

WHEREAS the property classes have been prescribed by the Minister of Finance pursuant to Section 7 of the *Assessment Act*, R.S.O. 1990, c. A.31, as amended;

WHEREAS pursuant to Section 313(1) of the *Municipal Act, 2001*, The Regional Municipality of Niagara may establish tax reductions for prescribed property subclasses for The Regional Corporation and the Area Municipalities;

WHEREAS the property subclasses for which tax rate reductions are to be established are in accordance with Section 8 of the *Assessment Act*, and,

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That the tax ratio for property in:
 - a. The residential property class is 1.000000;
 - b. The new multi-residential property class is 1.000000;
 - c. The multi-residential class is 1.970000;
 - d. The commercial property class is 1.734900;
 - e. The industrial property class is 2.630000;
 - f. The pipelines property class is 1.702100;
 - g. The farm property class is 0.250000;
 - h. The managed forest property class is 0.250000;
 - i. The landfill property class is 2.940261.

2. That the municipal purpose tax reduction for:
 - a. The vacant land and excess land subclasses in the commercial property class is 30%;
 - b. The vacant land and excess land subclasses in the industrial property class is 30%;
 - c. The first class of farmland awaiting development in the residential, multi-residential, commercial or industrial property classes is 25%;
 - d. The second class of farmland awaiting development in the residential, multi-residential, commercial or industrial property classes is 0%.
3. That for the purposes of this by-law:
 - a. The industrial property class includes all properties classified as industrial and large industrial as per Ontario Regulation 282/98;
 - b. The first class of farmland awaiting development and the second class of farmland awaiting development consist of land as defined in accordance with Ontario Regulation 282/98.
4. That this by-law shall come into force and effect on the day upon which it is passed.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed:

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO.

A BY-LAW TO SET AND LEVY THE RATES OF TAXATION FOR REGIONAL
GENERAL AND SPECIAL PURPOSES FOR THE YEAR 2019

WHEREAS the Regional Council of The Regional Municipality of Niagara (hereinafter referred to as "The Regional Corporation") has prepared and adopted a budget including estimates of all sums it required during the year 2019 for the purposes of the Regional Corporation pursuant to Section 289 (1) of the *Municipal Act 2001*, S.O. 2001, c. 25, as amended (hereinafter referred to as the "Municipal Act");

WHEREAS Regional Council by By-Law No. 2019-14 adopted the 2019 Waste Management Budget, and by By-Law No. 2019-29 adopted the 2019 Operating Budget and Tax Levy;

WHEREAS for the purposes of raising the general levy for the Regional Corporation, the Regional Corporation shall pass a by-law directing each Lower-Tier Municipality to levy a separate tax rate, as specified in the by-law, on the assessment in each property class in the Lower-Tier Municipality ratable for the purposes of The Regional Corporation, pursuant to Section 311 (2) of the Municipal Act;

WHEREAS the tax ratios and the tax rate reductions for prescribed property classes for the 2019 taxation year have been set out in By-Law No. 2019-42 of The Regional Corporation dated the 25th of April 2019;

WHEREAS The Regional Corporation is responsible for providing Waste Management services pursuant to By-Laws 8280-96, 8281-96, 8282-96 and 8283-96;

WHEREAS Regional Council is desirous of imposing a special levy for Waste Management purposes and the sums required by taxation in the year 2019 for the said purposes are to be levied by separate rates by the applicable Area Municipalities as directed by Regional by-law pursuant to Subsection 311 (4) of the Municipal Act; and,

WHEREAS Regional Council established tax rates for property classes, and other decisions consistent with setting and levying rates of taxation for regional purposes for 2019.

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That for the year 2019 in The Regional Municipality of Niagara the lower-tier municipalities shall levy upon the property tax classes set out in Schedule "A" the property tax rates applicable thereto.
2. That payment of all amounts directed to be levied pursuant to the provisions of this by-law and due to The Regional Municipality of Niagara shall be due and payable in the amounts and at the times shown on Schedule "B" attached to this by-law.
3. That for the year 2019 in The Regional Municipality of Niagara, the Town of Niagara-on-the-Lake be required to pay \$1,544,906 to the Regional Corporation as the charges for Waste Management purposes set out in Schedule "C". The remaining area municipalities shall levy upon the property tax classes and applicable subclasses the tax rates for Waste Management purposes set out in Schedule "C" attached to this by-law.
4. That if a lower-tier municipality fails to make any payment or portion thereof as provided in this by-law, the lower-tier municipality shall pay to the Regional Corporation interest due on the amount in default at the rate of fifteen (15) per cent per annum from the due date of the payment until the payment is made.
5. That this by-law shall come into force and effect on the day upon which it is passed.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed:

Schedule A – 2019 Tax Ratios, Sub-Class Reductions, and Rates

Property Classification	Tax Ratio	Sub-Class Reduction	Tax Rate by Class
Residential	1.000000		0.00566267
New Multi-Residential	1.000000		0.00566267
Multi-Residential	1.970000		0.01115546
Commercial	1.734900		0.00982417
Commercial - Excess	1.734900	30%	0.00687692
Commercial - Vacant	1.734900	30%	0.00687692
Landfill	2.940261		0.01664973
Industrial	2.630000		0.01489282
Industrial - Excess	2.630000	30%	0.01042498
Industrial - Vacant	2.630000	30%	0.01042498
Pipelines	1.702100		0.00963843
Farmland	0.250000		0.00141567
FAD 1	1.000000	25%	0.00424700
FAD 2	Class Ratio		Class Rate
Managed Forests	0.250000		0.00141567

Schedule B – 2019 GENERAL TAX LEVY**2019 Upper-Tier General Levy and Dates by Local Municipality (Taxable Levy)**

Municipality	Interim Payment Due March 13, 2019	Interim Payment Due May 15, 2019	Final Payment Due August 7, 2019	Final Payment Due October 16, 2019	2019 Approved General Levy	Regional Departments	Niagara Regional Police	Niagara Regional Housing	Niagara Peninsula Conservation Authority	Court Services
Fort Erie	5,481,277	5,481,277	5,970,814	5,970,814	22,904,182	11,670,002	9,188,214	1,740,343	343,482	(37,860)
Grimsby	6,273,994	6,273,994	7,430,383	7,430,383	27,408,753	13,965,144	10,995,262	2,082,617	411,035	(45,305)
Lincoln	5,043,903	5,043,903	5,639,517	5,639,517	21,366,840	10,886,703	8,571,497	1,623,531	320,427	(35,318)
Niagara Falls	18,214,623	18,214,623	20,370,856	20,370,856	77,170,957	39,319,683	30,957,805	5,863,735	1,157,296	(127,562)
Niagara-on-the-Lake	7,365,417	7,365,417	8,361,946	8,361,946	31,454,726	16,026,621	12,618,340	2,390,047	471,711	(51,994)
Pelham	3,603,433	3,603,433	3,977,292	3,977,292	15,161,450	7,724,971	6,082,149	1,152,022	227,368	(25,061)
Port Colborne	2,878,164	2,878,164	3,080,507	3,080,507	11,917,342	6,072,053	4,780,747	905,523	178,718	(19,699)
St. Catharines	23,371,245	23,371,245	25,168,619	25,168,619	97,079,728	49,463,485	38,944,384	7,376,474	1,455,855	(160,470)
Thorold	3,390,085	3,390,085	3,883,238	3,883,238	14,546,645	7,411,720	5,835,515	1,105,307	218,148	(24,045)
Wainfleet	1,300,920	1,300,920	1,453,728	1,453,728	5,509,296	2,807,063	2,210,103	418,617	82,620	(9,107)
Welland	7,128,946	7,128,946	7,791,948	7,791,948	29,841,788	15,204,811	11,971,296	2,267,487	447,522	(49,327)
West Lincoln	2,635,064	2,635,064	3,046,911	3,046,911	11,363,949	5,790,090	4,558,749	863,475	170,419	(18,784)
Regional Total Taxable Only	86,687,069	86,687,069	96,175,758	96,175,758	365,725,655	186,342,347	146,714,060	27,789,178	5,484,602	(604,532)

Schedule C – 2019 WASTE MANAGEMENT TAX RATES & LEVY**2019 Upper-Tier Special Levy (Waste Management) and Dates by Local Municipality
(Taxable Levy)**

Municipality	Interim Payment Due March 13, 2019	Interim Payment Due May 15, 2019	Final Payment Due August 7, 2019	Final Payment Due October 16, 2019	2019 Approved Special Levy
Fort Erie	656,840	656,840	681,433	681,433	2,676,546
Grimsby	452,694	452,694	472,157	472,157	1,849,702
Lincoln	393,664	393,664	407,537	407,537	1,602,400
Niagara Falls	1,686,399	1,686,399	1,778,801	1,778,801	6,930,399
Niagara-on-the-lake	369,902	369,902	402,551	402,551	1,544,906
Pelham	292,632	292,632	309,738	309,738	1,204,740
Port Colborne	437,090	437,090	448,450	448,450	1,771,080
St. Catharines	2,678,457	2,678,457	2,758,182	2,758,182	10,873,279
Thorold	357,948	357,948	379,817	379,817	1,475,531
Wainfleet	135,227	135,227	138,493	138,493	547,440
Welland	974,580	974,580	1,007,407	1,007,407	3,963,975
West Lincoln	215,154	215,154	228,995	228,995	888,297
Regional Total Taxable Only	8,650,585	8,650,585	9,013,563	9,013,563	35,328,295

Schedule C – 2019 WASTE MANAGEMENT TAX RATES & LEVY

Fort Erie			
Property Classification	2019 Roll Return CVA	Tax Rate by Class	Waste Management Levy by Class
Residential	3,359,194,245	0.00066173	2,222,880
New Multi-Residential	44,675	0.00066173	30
Multi-Residential	39,708,066	0.00130361	51,764
Commercial	237,567,305	0.00114804	272,737
Commercial - Excess	5,947,939	0.00080362	4,780
Commercial - Vacant	19,433,913	0.00080362	15,617
landfill	0	0.00194566	-
Industrial	43,972,135	0.00174035	76,527
Industrial - Excess	695,850	0.00121824	848
Industrial - Vacant	4,255,665	0.00121824	5,184
Pipelines	15,117,375	0.00112633	17,027
Farmland	53,887,634	0.00016543	8,915
FAD 1	0	0.00049630	-
Managed Forests	1,430,442	0.00016543	237
Taxable Totals	3,781,255,244		\$ 2,676,546

Grimsby			
Property Classification	2019 Roll Return CVA	Tax Rate by Class	Waste Management Levy by Class
Residential	4,049,868,233	0.00038215	1,547,657
New Multi-Residential	0	0.00038215	-
Multi-Residential	28,987,222	0.00075284	21,823
Commercial	307,241,468	0.00066299	203,698
Commercial - Excess	12,979,562	0.00046409	6,024
Commercial - Vacant	13,424,816	0.00046409	6,230
landfill	0	0.00112362	-
Industrial	46,407,090	0.00100505	46,641
Industrial - Excess	3,520,208	0.00070354	2,477
Industrial - Vacant	3,031,791	0.00070354	2,133
Pipelines	7,680,754	0.00065046	4,996
Farmland	83,132,103	0.00009554	7,942
FAD 1	0	0.00028661	-
Managed Forests	841,498	0.00009554	80
Taxable Totals	4,557,114,745		\$1,849,702

Schedule C – 2019 WASTE MANAGEMENT TAX RATES & LEVY

Lincoln			
Property Classification	2019 Roll Return CVA	Tax Rate by Class	Waste Management Levy by Class
Residential	2,958,147,963	0.00042467	1,256,237
New Multi-Residential	0	0.00042467	-
Multi-Residential	20,899,950	0.00083660	17,485
Commercial	195,565,791	0.00073676	144,085
Commercial - Excess	6,887,184	0.00051573	3,552
Commercial - Vacant	9,875,988	0.00051573	5,093
landfill	0	0.00124864	-
Industrial	91,363,016	0.00111688	102,042
Industrial - Excess	2,628,733	0.00078182	2,055
Industrial - Vacant	8,123,146	0.00078182	6,351
Pipelines	20,004,809	0.00072283	14,460
Farmland	479,789,455	0.00010617	50,939
FAD 1	0	0.00031850	-
Managed Forests	950,726	0.00010617	101
Taxable Totals	3,794,236,761		\$ 1,602,400

Niagara Falls			
Property Classification	2019 Roll Return CVA	Tax Rate by Class	Waste Management Levy by Class
Residential	8,321,858,319	0.00050854	4,231,998
New Multi-Residential	10,326,160	0.00050854	5,251
Multi-Residential	305,099,748	0.00100182	305,655
Commercial	2,320,992,659	0.00088227	2,047,742
Commercial - Excess	57,323,375	0.00061759	35,402
Commercial - Vacant	134,408,251	0.00061759	83,009
landfill	3,152,500	0.00149524	4,714
Industrial	99,445,042	0.00133746	133,004
Industrial - Excess	5,551,962	0.00093622	5,198
Industrial - Vacant	32,549,384	0.00093622	30,473
Pipelines	43,530,046	0.00086559	37,679
Farmland	79,611,005	0.00012714	10,122
FAD 1	0	0.00038141	-
Managed Forests	1,196,000	0.00012714	152
Taxable Totals	11,415,044,451		\$ 6,930,399

Schedule C – 2019 WASTE MANAGEMENT TAX RATES & LEVY

Niagara-on-the-Lake	2019 Roll Return	Tax Rate by	Waste
Property Classification	CVA	Class	Management
			Levy by Class
Residential	3,961,385,384	N/A	-
New Multi-Residential	0	N/A	-
Multi-Residential	14,470,825	N/A	-
Commercial	730,660,025	N/A	-
Commercial - Excess	13,737,917	N/A	-
Commercial - Vacant	14,574,197	N/A	-
landfill	0	N/A	-
Industrial	30,529,998	N/A	-
Industrial - Excess	91,750	N/A	-
Industrial - Vacant	15,123,624	N/A	-
Pipelines	17,983,879	N/A	-
Farmland	494,516,457	N/A	-
FAD 1	0	N/A	-
Managed Forests	1,232,094	N/A	-
Taxable Totals	5,294,306,150		\$ 1,544,906

Pelham	2019 Roll Return	Tax Rate by	Waste
Property Classification	CVA	Class	Management
			Levy by Class
Residential	2,409,606,273	0.00044996	1,084,226
New Multi-Residential	544,000	0.00044996	245
Multi-Residential	17,587,500	0.00088642	15,590
Commercial	87,823,350	0.00078064	68,558
Commercial - Excess	778,851	0.00054644	426
Commercial - Vacant	2,191,994	0.00054644	1,198
landfill	0	0.00132300	-
Industrial	2,968,951	0.00118339	3,513
Industrial - Excess	44,325	0.00082838	37
Industrial - Vacant	88,500	0.00082838	73
Pipelines	16,854,093	0.00076588	12,908
Farmland	157,009,692	0.00011249	17,662
FAD 1	0	0.00033747	-
Managed Forests	2,701,293	0.00011249	304
Taxable Totals	2,698,198,822		\$ 1,204,740

Schedule C – 2019 WASTE MANAGEMENT TAX RATES & LEVY

Port Colborne			
Property Classification	2019 Roll Return CVA	Tax Rate by Class	Waste Management Levy by Class
Residential	1,565,724,605	0.00084155	1,317,636
New Multi-Residential	600,000	0.00084155	505
Multi-Residential	38,735,625	0.00165785	64,218
Commercial	130,736,515	0.00146001	190,877
Commercial - Excess	197,700	0.00102200	202
Commercial - Vacant	2,371,814	0.00102200	2,424
landfill	0	0.00247438	-
Industrial	69,476,127	0.00221328	153,770
Industrial - Excess	1,972,386	0.00154929	3,056
Industrial - Vacant	7,347,980	0.00154929	11,384
Pipelines	10,224,296	0.00143240	14,645
Farmland	53,767,874	0.00021039	11,312
FAD 1	1,380,350	0.00063116	871
Managed Forests	857,705	0.00021039	180
Taxable Totals	1,883,392,977		\$ 1,771,080

St. Catharines			
Property Classification	2019 Roll Return CVA	Tax Rate by Class	Waste Management Levy by Class
Residential	11,794,504,916	0.00063424	7,480,547
New Multi-Residential	58,774,801	0.00063424	37,277
Multi-Residential	671,819,914	0.00124945	839,405
Commercial	1,949,084,327	0.00110034	2,144,655
Commercial - Excess	16,060,350	0.00077024	12,370
Commercial - Vacant	14,729,679	0.00077024	11,345
landfill	0	0.00186483	-
Industrial	155,684,682	0.00166805	259,690
Industrial - Excess	4,680,999	0.00116764	5,466
Industrial - Vacant	25,185,527	0.00116764	29,408
Pipelines	30,447,179	0.00107954	32,869
Farmland	127,695,843	0.00015856	20,247
FAD 1	0	0.00047568	-
Managed Forests	0	0.00015856	-
Taxable Totals	14,848,668,217		\$ 10,873,279

Schedule C – 2019 WASTE MANAGEMENT TAX RATES & LEVY

Thorold	2019 Roll Return	Tax Rate by	Waste
Property Classification	CVA	Class	Management
			Levy by Class
Residential	1,900,738,851	0.00057439	1,091,765
New Multi-Residential	63,764,225	0.00057439	36,626
Multi-Residential	41,331,597	0.00113155	46,769
Commercial	163,736,133	0.00099651	163,165
Commercial - Excess	4,497,668	0.00069756	3,137
Commercial - Vacant	8,197,198	0.00069756	5,718
landfill	0	0.00168886	-
Industrial	49,552,775	0.00151065	74,857
Industrial - Excess	3,618,100	0.00105745	3,826
Industrial - Vacant	17,116,048	0.00105745	18,099
Pipelines	24,947,280	0.00097767	24,390
Farmland	49,501,686	0.00014360	7,108
FAD 1	0	0.00043079	-
Managed Forests	495,616	0.00014360	71
Taxable Totals	2,327,497,177		\$ 1,475,531

Wainfleet	2019 Roll Return	Tax Rate by	Waste
Property Classification	CVA	Class	Management
			Levy by Class
Residential	873,684,483	0.00056268	491,605
New Multi-Residential	0	0.00056268	-
Multi-Residential	456,750	0.00110848	506
Commercial	18,018,767	0.00097619	17,590
Commercial - Excess	989,173	0.00068334	676
Commercial - Vacant	567,788	0.00068334	388
landfill	0	0.00165443	-
Industrial	3,751,550	0.00147985	5,552
Industrial - Excess	104,475	0.00103589	108
Industrial - Vacant	116,500	0.00103589	121
Pipelines	5,384,370	0.00095774	5,157
Farmland	181,514,872	0.00014067	25,534
FAD 1	0	0.00042201	-
Managed Forests	1,448,099	0.00014067	204
Taxable Totals	1,086,036,827		\$ 547,440

Schedule C – 2019 WASTE MANAGEMENT TAX RATES & LEVY

Welland	2019 Roll Return	Tax Rate by	Waste
Property Classification	CVA	Class	Management
			Levy by Class
Residential	4,024,138,874	0.00075219	3,026,917
New Multi-Residential	10,031,200	0.00075219	7,545
Multi-Residential	160,965,800	0.00148181	238,521
Commercial	373,075,195	0.00130497	486,852
Commercial - Excess	7,844,972	0.00091348	7,166
Commercial - Vacant	18,764,281	0.00091348	17,141
landfill	384,125	0.00221163	850
Industrial	70,589,295	0.00197826	139,644
Industrial - Excess	1,587,977	0.00138478	2,199
Industrial - Vacant	5,120,850	0.00138478	7,091
Pipelines	20,402,728	0.00128030	26,122
Farmland	19,967,262	0.00018805	3,755
FAD 1	0	0.00056414	-
Managed Forests	915,957	0.00018805	172
Taxable Totals	4,713,788,516		\$ 3,963,975

West Lincoln	2019 Roll Return	Tax Rate by	Waste
Property Classification	CVA	Class	Management
			Levy by Class
Residential	1,625,491,549	0.00044264	719,508
New Multi-Residential	0	0.00044264	-
Multi-Residential	6,853,750	0.00087200	5,976
Commercial	71,372,292	0.00076794	54,810
Commercial - Excess	741,303	0.00053756	398
Commercial - Vacant	2,286,639	0.00053756	1,229
landfill	0	0.00130148	-
Industrial	32,175,314	0.00116414	37,457
Industrial - Excess	454,400	0.00081490	370
Industrial - Vacant	972,184	0.00081490	792
Pipelines	28,179,364	0.00075342	21,231
Farmland	418,609,818	0.00011066	46,323
FAD 1	0	0.00033198	-
Managed Forests	1,838,289	0.00011066	203
Taxable Totals	2,188,974,902		\$ 888,297

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO.

A BY-LAW TO ADOPT OPTIONAL TOOLS FOR THE PURPOSES OF
ADMINISTERING LIMITS FOR THE COMMERCIAL, INDUSTRIAL AND MULTI-
RESIDENTIAL PROPERTY CLASSES FOR THE YEAR 2019

WHEREAS the Corporation of The Regional Municipality of Niagara (hereinafter referred to as “The Municipality”) may, in accordance with section 329.1 of the *Municipal Act, 2001*, S.O. 2001 c.25, as amended (hereinafter referred to as “The Act”), and Ontario Regulation 131/17, as made and amended under The Act, modify the provisions and limits set out in Part IX The Act, with respect to the calculation of taxes for municipal and school purposes for properties in the commercial, industrial and multi-residential property classes;

WHEREAS The Municipality did, in accordance with the terms and provisions of Ontario Regulation 73/03 as made and amended under *The Act*, pass a by-law ending the application of Part IX of *The Act* for the Multi-Residential property class in 2017;

WHEREAS The Municipality did, in accordance with the terms and provisions of the Ontario Regulation 75/03 as made and amended under *The Act*, pass by-laws to initiate phasing out the application of Part IX of *The Act* for Industrial and Commercial property classes in 2016 and 2017 and 2018 respectively;

WHEREAS for the purposes of this by-law the commercial classes shall be considered a single property class and the industrial classes shall be deemed to be a single property class.

WHEREAS “uncapped taxes” means, the taxes for municipal and school purposes that would be levied for the taxation year but for the application of Part IX of The Act; and

WHEREAS “capped taxes” means, the taxes for municipal and school purposes that shall be levied for the taxation year as a result of the application of Part IX of The Act;

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That having determined that the eligibility requirements set out under Section 8.2 of Ontario Regulation 73/03 have been met in respect of the Industrial property class, The Municipality opts to end the application of Part IX of The Act for that class for the 2019 and subsequent taxation years;

2. That in accordance with Section 8.3 of Ontario Regulation 73/03, The Municipality opts to continue the phase-out of the application of Part IX of *The Act* for the Commercial property class with 2019 being the third year of phase-out.
3. That in accordance with Section 8.3 of Ontario Regulation 73/03, The Municipality exits the phase-out of the application of Part IX of *The Act* for the Industrial property class with 2019 being the final year of phase-out.
4. That paragraphs 1, 2, 3 and 4 of Subsection 329.1 (1) of *The Act* shall apply to the Commercial property class for 2019, whereby
 - i) In determining the amount of taxes for municipal and school purposes for the year under Subsection 329 (1) and the amount of the tenant's cap under Subsection 332 (5), the amount to be added under paragraph 2 of Subsection 329 (1), and the increasing amount under paragraph 2 of Subsection 332 (5) shall be the greater of:
 - (a) The amount of the uncapped taxes for the previous year multiplied by ten per cent (10%), and
 - (b) The amount of the capped taxes for the previous year multiplied by ten per cent (10%).
 - ii) The amount of the taxes for municipal and school purposes for a property for a taxation year shall be the amount of the uncapped taxes for the property for that year if the amount of the uncapped taxes exceeds the amount of the taxes for municipal and school purposes for the property for the taxation year as determined under Section 329, as modified under Section 329.1 of *The Act* and this Section, by five hundred dollars (\$500.00) or less.
 - iii) The amount of the taxes for municipal and school purposes for a property for a taxation year shall be the amount of the uncapped taxes for the property for the year if the amount of the taxes for municipal and school purposes for the property for the taxation year as determined under section 330, as modified under section 329.1 of *The Act* and this by-law exceed the uncapped taxes, by fifty dollars (\$50.00) or less.
5. That paragraphs 1, 2 and 3 of Subsection 8.0.2 (2) of Ontario Regulation 73/03 shall apply to the Commercial property class for 2019 whereby properties that meet

any of the following conditions shall be exempt from the capping calculations set out under Part IX of *The Act* for the taxation year:

- (i) The capped taxes for the property in the previous year were equal to its uncapped taxes for that year.
 - (ii) The capped taxes for the property in the previous year were lower than the property's uncapped taxes for that year, and the current year's capped taxes would be higher than the current year's uncapped taxes if Part IX were applied.
 - (iii) The capped taxes for the property in the previous year were higher than the property's uncapped taxes for that year, and the current year's capped taxes would be lower than the current year's uncapped taxes if Part IX were applied.
6. That Section 15.0.1 of Ontario Regulation 73/03 shall apply to the Commercial property class for 2019 whereby, but for the application of that section, the capped taxes for the property would be less than the uncapped taxes for the property, the lesser of the following amounts shall be added to the capped taxes calculated in the absence of this adjustment:
- (i) The amount, if any, by which the current year's uncapped taxes exceed the previous year's uncapped taxes; and
 - (ii) The amount of that the current year's uncapped taxes exceed the capped taxes calculated in the absence of this adjustment.
7. That paragraph 8 of Subsection 329.1 (1) of The Act shall apply to the Commercial property class for 2019 whereby all properties that become eligible within the meaning of Subsection 331 (20) of The Act, the taxes for municipal and school purposes for the year or portion of the year shall be the greater of the amount of the taxes determined under Subsection 331 (2); and the uncapped taxes for the property.
8. That this by-law shall come into force and effect on the day upon which it is passed.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed:

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. < >

A BY-LAW TO ADOPT, RATIFY AND CONFIRM THE ACTIONS OF
REGIONAL COUNCIL AT ITS MEETING
HELD APRIL 25, 2019

WHEREAS subsection 5 (3) of the Municipal Act, S.O. 2001, Ch. 25, as amended, provides that, except if otherwise authorized, the powers of Regional Council shall be exercised by by-law; and,

WHEREAS it is deemed desirable and expedient that the actions of Regional Council as herein set forth be adopted, ratified and confirmed by by-law.

NOW THEREFORE the Council of The Regional Municipality of Niagara enacts as follows:

1. That the actions of the Regional Council at its meeting held April 25, 2019, including all resolutions or motions approved, are hereby adopted, ratified and confirmed as if they were expressly embodied in this by-law.
2. That the above-mentioned actions shall not include:
 - a) Any actions required by law to be taken by resolution; or
 - b) Any actions for which prior Ontario Municipal Board approval is required, until such approval is obtained.
3. That the Chair and proper officials of The Regional Municipality of Niagara are hereby authorized and directed to do all things necessary to give effect to the above-mentioned actions and to obtain approvals where required.
4. That unless otherwise provided, the Chair and Clerk are hereby authorized and directed to execute and the Clerk to affix the seal of The Regional Municipality of Niagara to all documents necessary to give effect to the above-mentioned actions.
5. That this by-law shall come into force and effect on the day upon which it is passed.

THE REGIONAL MUNICIPALITY OF NIAGARA

James Bradley, Regional Chair

Ann-Marie Norio, Regional Clerk

Passed: < >