

PART C – THE APPENDIX

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TO: GENERAL COMMITTEE

SUBJECT: REVIEW OF EXISTING FINANCIAL INCENTIVES PROGRAMS

WARD: ALL

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EXTENSION # 4440

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MANAGEMENT

CHIEF ADMINISTRATIVE OFFICER APPROVAL: C. LADD, CHIEF ADMINISTRATIVE OFFICER *CL*

RECOMMENDED MOTION

1. That lands within the built boundary shown in Appendix "A" attached to this Staff Report PLN032-15, be designated Community Improvement Project Area to allow for incentives to be developed through a Community Improvement Plan.
2. That a draft Community Improvement Plan (CIP) be prepared with incentives as outlined in Appendix "B" attached to this report to support community strategic objectives and priorities, growth management and planning objectives within the designated Community Improvement Project Area shown in Appendix "A" including affordable housing, brownfield redevelopment, and the development of mixed use nodes and corridors.
3. That staff undertake further consultation with the Province, the public, and stakeholders on the proposed Community Improvement Plan and financial incentives, including the holding of a statutory public meeting, and report back to General Committee.

PURPOSE & BACKGROUND

Report Overview

4. The purpose of this Staff Report is to recommend a framework for developing a new Community Improvement Plan (CIP) with financial incentives designed to achieve emerging community goals and priorities which target key planning and growth management objectives for development within the built boundary including affordable housing, brownfield redevelopment, and mixed-use development.
5. This report arises from several converging considerations which are summarised as follows:
 - a) The need to assess the current Downtown, Allandale and Georgian College CIP's, in light of the fact, that they were developed prior to the Places to Grow Provincial Growth Plan (henceforth Growth Plan) came into effect.
 - b) Council direction for staff to explore opportunities for a sustainable source of funding of the CIP financial incentives (Motion 10-G-257).

- c) Development of incentives for brownfield redevelopment as part of a Brownfield Strategy.
- d) Review of incentives for Affordable Housing as recommended in both the Affordable Housing Strategy and the Built Form Task Force Report.
- e) Investigation into potential incentives for Intensification Nodes and Corridors, to mitigate the cost of development, subject to zoning approval of zoning for mixed use nodes and corridors. (Incentives PLN002-15)(15-G-022)(Mixed Use Zoning PLN018-14)

Existing Community Improvement Plans & Financial Incentives

- 6. There are currently 3 CIPs in effect including the Downtown CIP, Allandale CIP, and Georgian College CIP each with incentives to achieve specific goals including tax increment grants (TIG), loans and grants for façade improvements, etc. The CIPs have had success in achieving a number of objectives and goals as measured by increased assessment, and an increased inventory of student housing (See Annual Progress Report – November 30, 2015 Memo to Council).
- 7. The Downtown and Allandale CIPs, more or less, correspond with the Official Plan City Centre designation and Planning Area and Urban Growth Centre (UGC) boundary. The third CIP is the Georgian College Neighbourhood CIP which offers grants for projects that provide for multi-unit student housing in managed apartment buildings.
- 8. The current CIP's, particularly Downtown and Allandale CIP's have been incrementally modified to add incentives, expand or modify existing programs, or expand the CIP Project Area boundaries and address issues such as lighting and laneway safety raised by the BIA or other stakeholders in the CIP areas.

ANALYSIS

Planning Context of the Current CIP Plans

- 9. The Downtown and Allandale CIP's were adopted in a time when storefront vacancy rates in the Downtown and Allandale were high. These CIP's were founded on the principle that a healthy vibrant City Centre supports and benefits the City and broader region as a whole, and thus warrants special consideration in the form of financial incentives to attract business to these areas. While this may remain valid today, storefront vacancies and building façade in the Downtown have improved.
- 10. Furthermore, since these CIP's were prepared, the planning landscape at the local and provincial level has changed considerably with greater emphasis on addressing urban growth, sustainability and transportation challenges.
- 11. At the provincial level, the Places to Grow Growth Plan for the Greater Golden Horseshoe and the updated 2014 Provincial Policy statement came into effect after these CIP's were adopted. The Growth Plan identifies the City of Barrie as an Urban Growth Centre (UGC) within the region. Intensified mixed use development including residential, office, commercial and institutional uses are contemplated at densities of 150 persons and jobs per hectare in the UGC. The Growth Plan also sets population targets and requires at least 40% of growth to be accommodated within the built up area before expanding into Greenfield areas.
- 12. In response to the Growth Plan and development pressures, the City prepared an Intensification Study in 2009 which identified key intensification areas including the UGC, mixed use nodes and

corridors along major arterial roads, intersections and areas within walking distance of transit stations.

13. Urban Design Guidelines were prepared in 2011 for these key intensification areas to support a high standard of urban design and to provide guidance for development of private and public realm lands in these intensification areas. Zoning standards for mixed use nodes and corridors have been developed to implement the type of development envisaged for these areas.
14. Other City initiatives, that have been developed since Downtown and Allandale CIP's were prepared, include, the incorporation of updated Brownfield policies into the Official Plan; and, the approval of an Affordable Housing Strategy.
15. At this time, it is necessary to consider the development of a new CIP to facilitate the development of more affordable housing units; to encourage the clean-up and development of brownfield sites; and, to encourage development of mixed use nodes and corridors.

Proposed Community Improvement Plan & Financial Incentives

16. A public meeting, per the Municipal Act, is required to introduce financial incentives through a CIP. Although the Ministry of Municipal Affairs and Housing (MMAH) no longer approves CIPs they are required to review and approve the proposed community engagement plan.
17. The recommended programs to be considered, and refined through public consultation, are outlined in the proposed CIP attached as Appendix "B" to this report. In addition, the guiding principles and eligibility criteria, under which the Programs will be managed, are outlined in Appendix "B".
18. The two financial incentive programs, proposed for community consultation, include a renovation grant to replace the current loan and façade program; and, a redevelopment grant to facilitate the development of more affordable housing units; to encourage the clean-up and redevelopment of brownfield sites; and, to encourage the development of mixed use nodes and corridors.

Renovation Grant Program

19. The Renovation Grant Program is intended for small scale projects which are comparable to, and intended to replace, forgivable loan programs currently available in the Downtown and Allandale CIP areas. The grant is for renovating, restoring and improving existing buildings within the Urban Growth Centre (UGC) identified on Schedule I of the Official Plan. In addition, Heritage buildings listed on the Municipal Heritage Register will be eligible for this grant which is intended to restore, improve and maintain the heritage characteristics of these buildings.
20. The replacement of the current four *Forgivable Loan* programs with a single *Renovation Grant* program will simplify the application process and reduce administrative processing time and costs. In addition, it is anticipated that this will remove some barriers associated with registration of forgivable loans, and reduce costs to owners when changes are needed for re-financing, or transferring loans with a change of ownership under the current forgivable loan programs.
21. As with the current forgivable loans, these grants would be subject to delegated approval by the Director of Planning, subject to annual budgetary allocation of funds.

Redevelopment Grant Program

22. This program is intended for redevelopment projects, within the specified areas or type of project within the built boundary. Redevelopment includes adaptive re-use and additions to existing buildings on eligible properties, and redevelopment of vacant lands on eligible properties.

23. For redevelopment projects, that include affordable housing units, this grant program would include, as recommended by the Built Form Task Force, a development charge exemption grant, on a sliding scale, based on housing segmentation including emergency shelter, transitional housing, social housing, rental housing, and affordable home ownership (Refer to Appendix "C" attached). In addition, these types of redevelopment projects would be eligible for a Tax Increment Grant as established in our existing CIPs.
24. For redevelopment projects, that address brownfield sites, and/or, mixed use nodes and corridors objectives, under this grant program, these types of projects would be eligible for a Tax Increment Grant, as established in our existing 3 CIPs.
25. The redevelopment projects, that achieve student housing objectives, as outlined in the Georgian CIP would continue.
26. Staff are currently reviewing the application process for redevelopment grants in terms of streamlining the application review and approval process; and, to help expedite the program objectives and will report back to General Committee.

ENVIRONMENTAL MATTERS

27. The Redevelopment Grant Program for Brownfield costs will facilitate clean up and redevelopment of vacant contaminated sites. Similarly, sites identified as existing conditions in the Source Protection Plan are eligible for the Redevelopment grant which support soil and water quality improvement.
28. The Redevelopment Grant framework provides scope to layer in grant enhancements for adding sustainability features such as LEED or green rooves, geothermal or solar energy applications.

ALTERNATIVES

29. The proposed CIP framework, outlined above, is presented for consultation purposes. At this time, there are a number of variations on the type of incentive programs offered and timing of payment of the grant. Staff recommend that, following consultation, some options be prepared and evaluated in the context of achieving the CIP objectives.

FINANCIAL

30. The recommendations at this stage would not have an immediate budgetary impact. Following the public consultation, staff will report back to General Committee with recommendations regarding the proposed CIP.
31. If the CIP is approved, applications could be received in 2016 with funding most likely needed in 2017. Staff anticipate that an annual operating budget contribution would continue to be required as with the current financial incentive programs in order to ensure that the CIP reserve fund is maintained.

Transition - Current Programs:

32. This staff report recommends that current small forgivable loans and grants for significant grant applications within the Downtown and Allandale CIP's be received up to April 30th 2016, and considered and processed under the current CIP provisions. Afterwards, projects will follow the new renovation or redevelopment grant programs.

33. Two significant grant applications in the Allandale area have not received funding approval in previous years. One of these may require funds to be budgeted in 2017 if considered and approved by Council in 2016. In addition, funds have been set aside for part of another project in the Downtown CIP area which has not been acted on at this point. Staff recommend leaving these funds in the budget at this time.
34. In terms of budgeting for CIP incentives, an application is on file for a student housing project in the Georgian College CIP. Staff anticipate reporting to Council in 2016 on this application, and if considered and approved, funds may need to be budgeted for payment in 2017 and in subsequent years.

Funding of Proposed Renovation Grant Program

35. Staff recommend that these grants be funded in a similar way to the current small forgivable loans through an annual budgetary process. Stable predictable funding would facilitate administration of this program. In review of past years for small grants and forgivable loans, the annual budgetary amount assigned has been between \$150,000 and \$250,000 for forgivable loans and small grants. For the past five years, the full amount has been allocated to applications received by the end of the summer of any year. New applications received after that date are held for consideration in the following year subject to budgetary approval.
36. To align with other streetscape improvements, it is suggested that there be built-in flexibility to target specific areas for a specified time frame. For example, the Renovation Grant can be prioritized so as to encourage renovations of buildings with frontage on Dunlop Street between Mulcaster Street and High Street. These priority areas for allocation of funds would be considered on an annual basis, through the budgetary process, and review of a monitoring/progress report.
37. With the transition measures proposed, if the proposed new CIP Renovation program is implemented in 2016, funding for these grants would only need to be budgeted for in the 2017 budget.

Funding of Redevelopment Grant Program

38. The previous tax increment grants were based on Council consideration of every application. As with current grants, all grants are subject to funding availability which shall be confirmed by the Treasurer. Staff will report back to General Committee on suggested program delivery options to stream line the application and review process.
39. Staff have currently included condominium development, which meets the affordability criteria outlined in the Affordable Housing Strategy, as being eligible for the programs described herein. However, as part of the consultation process, staff will be working with the Legal Services Department to determine the feasibility of securing the long term affordability of condominium projects which receive grants through a development agreement which would include a mechanism for recovering costs if the project fails to meet affordability criteria.
40. Although staff are not aware of any proposed emergency shelters, transition housing or social housing applications at this time, it is possible that with the proposed incentives in place, the City may receive an application for any one of these types of affordable housing projects before sufficient funds are available in the CIP reserve fund to cover the cost of Development Charge Equivalent Grant being recommended through this program. In this eventuality, the application would require Council approval.
41. Redevelopment grants, that are funded through the tax increment based program, would be paid out after the development is completed and the increased taxes are paid. It is likely that any projects considered and approved in 2016 under this program would at the soonest need to be

paid out in 2018. Thus there is no direct budgetary impact to be considered for this type of project at this time.

- 42. A more substantial fund, in an amount to be determined following the public consultation and review of this new CIP, may need to be allocated to the reserve account through the 2017 budgetary process. This would cover projects for which funds may not be available until such time as the redevelopment grant fund can be built up through diverting a portion of the tax increment revenue received from other projects that are approved.
- 43. Staff are recommending that a percentage of taxes collected from a project, approved under the proposed CIP's tax increment grant program, be allocated to the CIP reserve account in order to build up this account. As shown on the table below, a percentage would be paid out to cover costs of development and the remaining percentage would be placed in the account to funding future affordable housing projects that need a direct grant, or that would benefit from some front end funding.

Tax Increment Grant Payment to Applicant	Tax Increment Revenue Allocated to the Redevelopment Grant for future Projects
Year 1 -100% pro-rated	0%
Year 2 -100 %	0%
Year 3 - 75%	25%
Year 4 50%	50%
Year 5 -25 %	75%

- 44. Until such time as sufficient funds are available in the CIP reserve fund through diverting a portion of the increased taxes from the Tax Increment Grant approved projects, the reserve fund would require an annual budgetary allocation which could come from the following or any combination thereof:

Option A: Use Existing Available CIP Reserve Funds:

- 45. Prioritise emergency shelter or transition housing projects from available funds in the CIP reserve. This would be over and above the 2016 budget recommendation for small grants and loans for the Downtown and Allandale CIPs. If these funds were used for this type of affordable housing project in 2016, then new funds would have to be budgeted if dormant applications were re-activated.

Option B: Apply a percentage of any surplus in any year to fund the CIP Reserve:

- 46. If there is any surplus from annual operating budget, an option may be to allocate some of this to fund redevelopment grants for emergency, transition or social housing projects that need direct grants or a percentage of front end funding.
- 47. This option does not provide a certainty that funds would be available but does offer some opportunity to earmark some of these funds for these types of affordable housing projects.

48. These proposed changes would put in place a long term strategy which would replace the need to consider DC deferral grants.

LINKAGE TO 2014-2018 STRATEGIC PLAN

49. The recommendations included in this Staff Report support the following goals identified in the 2014-2018 Strategic Plan:

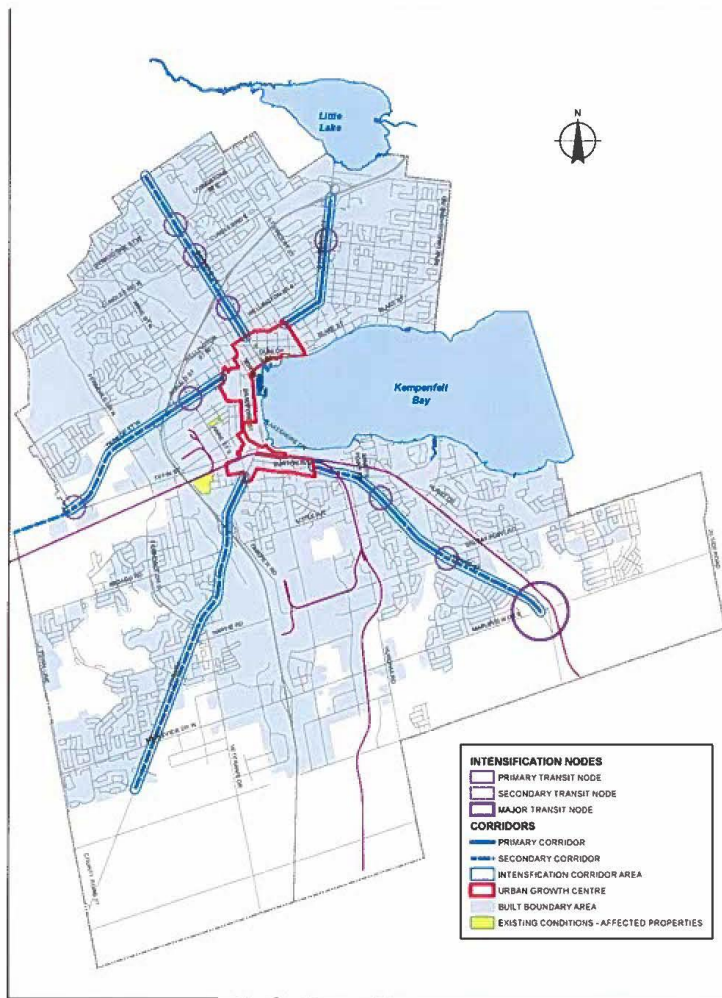
- Responsible Spending
- Inclusive Community

50. The expenditure of public funds to target outcomes and achieve growth management and planning and development objectives that may otherwise be difficult to achieve given barriers to development in the built boundary.

51. Incentives are proposed at different levels to encourage a spectrum of affordable housing types which supports an inclusive community.

Attachments: Appendix "A" – Built Boundary – Community Improvement Project Area
Appendix "B" – Framework for Financial Incentives Proposed CIP Plan
Appendix "C" – Housing Spectrum – Level of Grant

APPENDIX "A"
BUILT BOUNDARY – COMMUNITY IMPROVEMENT PROJECT AREA



APPENDIX "B"

FRAMEWORK FOR FINANCIAL INCENTIVES PROPOSED CIP PLAN

1.0 ELIGIBLE PROJECTS WITHIN THE BUILT BOUNDARY (CIP PROJECT AREA)

Properties located within the Urban Growth Centre identified in the Community Improvement Project Area Map - Appendix "A" subject to the specific eligibility criteria detailed for Renovation Grants and Redevelopment Grants.

2.0 RENOVATION GRANT

The purpose of this grant is to assist in the restoration of ground and upper-level commercial uses within the Downtown and Allandale area, and listed buildings.

The proposed improvements are intended to provide for complete use of existing buildings for a combination of residential, commercial and mixed use opportunities in these areas.

Applies to:

Buildings within the Urban Growth Centre identified on Schedule I of the Official Plan.

Buildings listed on the Municipal Heritage Register.

Description

Eligible renovations include interior and exterior renovations or improvements such as façade and sign improvements, adaptive re-use improvements and upgrade to building code improvements. In addition, the restoration and renovation of the interior or exterior of buildings listed on the Municipal Heritage Register.

The improvements shall result in occupied office or residential space on upper levels, and improved retail space at street level.

This grant is intended to support availability of enhanced office and residential space on upper floors and reduce property tax rebates for unoccupied office space.

Added employment and residential population in these upper level areas would support daytime street level retail activity on affected main streets.

The grant shall only be available to property owners (not tenants) who will be required to enter into a Renovation Grant Agreement with the City.

Eligibility Criteria:

Eligible Buildings

Existing buildings located within the Urban Growth Centre identified on Schedule I of the Official Plan.

Buildings Identified on the City of Barrie Municipal Heritage Register where works proposed restore the interior and exterior heritage features.

Buildings which comply with all applicable by-laws and have taxes paid up to date at the time of application.

Ineligible Projects:

Auto related service stores, uses that involve drive through facilities.

Funding:

A basic grant for property owners for 50% of the renovation costs or \$25,000 per property whichever is the lesser.

An enhanced grant for property owners for 60% of the renovation costs or \$50,000 per property where a grocery store or drug store is offered on the ground floor of an existing building within the UGC or that is listed on the Municipal Heritage Register and in the appropriate zone.

Program Delivery Process:

Following annual operating budgetary approval, staff will advertise and invite applications for grants to be submitted within a set time frame for consideration.

A call for applications with a deadline setting out eligibility criteria and evaluation criteria and priority streets will be advertised.

Following the closing date the list of applications and details will be made available to the Director of Planning who shall evaluate only complete applications that meet all the criteria. Evaluation criteria shall be applied to select projects approved (refer to Appendix 1 – Evaluation Criteria).

Approval will be conditional and the works will be required to be completed within a year of conditional approval. If works are not completed within the specified time frame, conditional approval will be revoked and the applicant will be required to re-apply.

A Renovation Grant Agreement which may be registered on title between the City and the owner will be executed prior to release of funds for the grant.

Grants will be paid at the time of at least 50% occupancy of the building, and full occupancy where office space is provided at the upper levels.

Approved projects shall be completed within a year of approval, and extensions for completion of the work may be granted to conditionally approved projects at the discretion of the Director of Planning.

3.0 DEVELOPMENT CHARGES EQUIVALENT GRANT

A development charges equivalent grant will be available for different types of affordable housing.

The purpose of the grant is assist with front end payment of costs of development, with different percentages of the grant assigned to different types of affordable housing provided.

Housing qualifying for this type of grant shall meet social housing thresholds to qualify for this grant.

Refer to table in Appendix "C" for the grant equivalents applicable to types of affordable housing.

4.0 REDEVELOPMENT GRANT

The purpose of this grant is to provide for new developments in accordance with City planning policies:

- Proposed incentives include supporting within significant developments in the key intensification nodes and corridors
- Brownfield redevelopment

- The provision of Affordable housing within the built up area.
- Significant redevelopment of sites with existing buildings and designated heritage buildings.

Applies to:

Redevelopment Projects that result in an increased assessment of at least \$200,000 and that meet one of the following criteria:

- a. Properties or a consolidated group of properties with a minimum of 100m frontage on a road forming an Intensification Corridor, or on one of the intersection forming an Intensification nodes, within the Built Boundary Area as shown on the Community Improvement Project Area Map - Appendix A.
- b. Eligible intensification projects developed on confirmed brownfield sites within the Built Boundary Area as shown on Community Improvement Project Area Map - Appendix A.
- c. Adaptive re-use of buildings listed on the City of Barrie Heritage Register including designated or listed buildings within built boundary shown on the Community Improvement Project Area Map - Appendix A.
- d. City, County or lands owned by a School Board which are developed for an Innovation Centre or Community Hub within the built boundary area shown on the Community Improvement Project Area Map – Appendix A.
- e. Projects that involve clean-up of “Existing Condition” sites as identified in the Source Protection Plan.
- f. Any projects that involve the provision of types of affordable housing within the built boundary.

Eligible Projects shall comply with applicable density and zoning requirements. Properties within the Mixed Use Nodes and corridors shall be required to comply with the City’s mixed use node and corridor zoning standards and address the Intensification Area Urban Design Guidelines.

Description

A tax increment based grant will be offered to a property owner to cover a percentage of certain costs for eligible projects located on eligible properties within the built boundary described in Section 3.0 above.

The tax increment based grant is proposed to cover the following costs or a percentage of costs for eligible projects based on the type of project and deliverables:

- Building Permit Fees
- Planning Application Fees
- Costs of Environmental Site Assessments for Brownfields
- Clean up costs
- Costs associated with the provision of affordable housing based on a sliding scale as identified in Appendix “C”
- A percentage of costs for units built with universal design/accessibility

Verified brownfield redevelopments would be eligible for certain costs to be offset by the tax increment.

Eligible costs to be recovered from the tax increment would include:

- a) Costs of a Phase 2 and 3 Environmental Assessment Study, and Risk Assessment where clean up or site rehabilitation is confirmed as necessary
- b) Costs of preparing a Remediation and Monitoring Plan
- c) 50% of the costs of site remediation with an upset maximum that can be specified
- d) 50% rebate on building permit fees
- e) 50% rebate on development charges, except where an exemption of discount is in effect through the development charges by-law.

The intention is to only provide funding for costs of a site that is contaminated, and is to be used for a more sensitive use. In cases where a risk assessment determines that clean-up is not required, the redevelopment project will not be eligible for the below costs

Percentage of Tax Increment Repayment to Rebate Eligible Development Costs

Year 1	100 % pro-rated	Year 1	100%
		Year 2	90%
Year 2	100 %	Year 3	80%
		Year 4	70%
Year 3	75 %	Year 5	60%
		Year 6	50%
Year 4	50 %	Year 7	40%
		Year 8	30%
Year 5	25 %	Year 9	20%
		Year 10	10 %
Maximum: \$ 2.5 Million per project		Maximum: \$ 5 Million per project – applies only to specified affordable housing projects	

Enhanced Grant levels will be provided for certain types of affordable housing and based on a continuum of affordability and type and amount of affordable housing provided (refer to Appendix "C" - Affordable Housing Spectrum: Grant Levels).

It is intended that additional components are to be layered in at a future date as details and performance standards are developed for incorporation of sustainable development features.

For example, different levels of grant could be applied based on LEED or other sustainable development standards.

In addition incorporating sustainability elements, such as green roofs, solar or geothermal energy, recycled grey water, LID design and salt management plans, may be layered in through added scoring evaluation criteria.

Redevelopment Grant Process

A grant application shall be submitted at the time of Site Plan application and will be reviewed in parallel to the Site Plan application.

If a grant application is submitted after a Site Plan application has commenced or processed, a Site Plan amendment application or (new Site Plan application if applicable) shall be required to accompany the grant application and ensure enhanced development requirements of the redevelopment grant are addressed through the Site Plan review process.

Staff may provide feedback on a redevelopment grant application at the Site Plan Pre-consultation stage, at which time basic eligibility will be determined in conjunction with the Planning Department review. If the grant application comes in after the Site Plan pre-consultation meeting, the deliverables and requirements for Site Plan control may be elevated to meet the higher quality deliverables required for projects supported by grants.

Planning staff will evaluate the grant application for compliance with basic eligibility requirements and circulate the grant application for comments to applicable departments and provide a summary of comments to the landowner.

Upon receipt of an amended Site Plan to address the comments and recommendations from the Site Plan review, the landowner will submit a final grant application with amended Site Plan requirements including enhanced requirements for the grant application.

Staff's review shall evaluate the grant subject the following criteria:

- a) The project shall meet the minimum eligibility criteria in terms of location (a) to (e) noted, in paragraph 43 of this report.
- b) The project shall comply with all City By-laws and standards including the Mixed Use Node (MU1) and Mixed Use Corridor (MU2) zone when located in intensification nodes and corridors.
- c) The projects within the key intensification areas shall comply with minimum density standards established within the Official Plan where there is no implementing zoning provision in place.
- d) Where these projects are located outside of key intensification areas a minimum density of 50 units per hectare, and a maximum density of 120 units per hectare shall apply. (This is the lowest density range within the key intensification areas).
- e) The project shall have a minimum score of 50 out of 100 points based on the scoring criteria noted in Appendix "B" to be eligible.
- f) A minimum of 10% of new housing units shall be affordable as set out in section 3.3.2.2 of the Official Plan.
- g) The project shall meet the applicable Urban Design and Site Plan requirements to the satisfaction of the City of Barrie, Tall buildings guidelines and CEPTED Policies of the Official Plan to the satisfaction of the Planning Department.
- h) All projects are subject to funding availability, in consultation with Finance.

If approved, conditional approval shall be granted and legal services will prepare a Redevelopment Grant Agreement. The legal fees for this agreement and costs of registration on title may recover added to the eligible costs funded through the tax increment.

4.0 The Sale, Lease or Disposal of Public Lands for Special City Initiatives:

The primary purpose of the Built Boundary CIP is to facilitate investment and encourage the redevelopment in areas and with projects that meet community planning and growth management objectives.

In some instances, direct action on the part of the municipality may be appropriate to realize the objectives through special projects in areas identified.

Council may undertake any or a combination of the following as set out in Section 28(3) of the Planning Act:

1. Acquire land within the Built Boundary Community Improvement Project Area without the approval of the Minister, after the CIP is approved;
2. Hold land acquired within specified areas within the Built Boundary Community Improvement Project area; and
3. Clear, grade, or otherwise prepare the land for community improvement.

Council may also undertake any or a combination of the following as set out under Sections 28(6) of the Planning Act:

1. Construct, repair, rehabilitate or improve buildings on land acquired or held by the municipality or other public body in conformity with the CIP and sell, lease or otherwise dispose of any such buildings and land appurtenant thereto.
2. Sell, lease or otherwise dispose of any land acquired or held by the municipality in the Community Improvement Project Area for a use in conformity with the CIP.

The City may prioritize lands or areas for undertakings as described above. The type of project envisaged may include adaptive re-use of buildings for affordable housing, development of museums, Community Hubs or Innovation Centres through Private Public Partnerships, on former schools sites, or other publicly owned lands.

Definitions:

Emergency Facility Housing: Short term interim housing such as shelters, to address an immediate need to take a person or persons out of a harmful or high risk situation.

Transitional Housing Facilities: is a temporary type of accommodation that is meant to bridge the gap from homelessness to permanent housing by offering structure, supervision, support (for addictions and mental health, for instance), life skills, and in some cases, education and training.

Social Housing: Not for Profit housing, rent geared to income housing, housing where rental costs are supplemented with government subsidy.

Affordable Rental Housing: for purposes of the Grant program this shall be 30% of the lowest level income levels of minimum wage or provincial subsidy (lower than the PPS definition of affordable). Note that provision of 10% of affordable housing per the provincial policy definition of affordability is a pre-requisite to qualify for the Redevelopment grant. Provision of any housing at affordability lower than this definition will qualify for the affordable housing costs to be rebated through the tax increment.

Intensified Condominium Housing Units offered at affordable prices are intended to be set a level below that of the provincial definition.

Affordable Home ownership housing: Affordable housing offered to those in greater need with assistance to home ownership through an NGO, Charity, Church Group or other support organization such as Habitat for Humanity. (Caters to income levels that are lower than the provincial definition of affordability for provision of 10% of affordable housing).

Community Hubs: Any public space offering coordinated education, health care or social services. A community hub should provide a focal point and facilities to foster greater community activity and bring residents, the local business community and smaller organizations together to improve quality of life in their areas.

Innovation Centres: are spaces that ignite innovation. These spaces include meeting rooms, equipment and office space that are available for people to network and learn through seminars, workshops, events, peer to peer groups, and 1-1 mentoring. Support is given to start-ups to commercialize their ideas, offer resources and facilities to help small/medium enterprises to innovate within their organization. They may be linked to an academic or research institution.

Grocery Store: is a retail store that primarily sells food, including fresh food and packaged food. Additional household products may also be included.

Drug Store: a retail store where medicines are sold along with other miscellaneous articles (such as food, cosmetics, personal hygiene and cosmetic products). Medicines sold would include over the counter and should include prescription medicines available through a pharmaceutical dispensary.

APPENDIX 1 TO APPENDIX "B"
CIP SCORING CRITERIA
RENOVATION GRANT EVALUATION CRITERIA

Criteria	Factor	Score (Points)	Maximum Points
1. Application required on Location Selected Street	For example Year 1 Dunlop Street between Mulcaster and High Street – Subject		
2.Type of Development	Office and/or residential above grade	10	20
	At grade retail	10	
3.Property Description	Vacant Building	10	10
	Partially Vacant Building	5	
4.Conversion Type	Pre-existing vacant space	10	10
	Renovation	5	
5.Employment	Creates 10+ jobs	15	15
	Creates 6-10 jobs	10	
	Creates 1-5 jobs	5	
6.Residential Units Added	5+	15	15
	2-5	10	
	1	5	
7.Sustainability	<ul style="list-style-type: none"> • LEEDS or equivalent • Energy Saving Measures 		10
8.Design	<ul style="list-style-type: none"> • Materials utilized • Contribution to heritage preservation and character of the area • Accessibility • Landscaping • Signage 		20
			100

**CIP SCORING CRITERIA
REDEVELOPMENT GRANT PROGRAM (OVER \$100,000)**

Criteria	Factor	Score (Points)	Maximum Points
1. Density (Number of people/jobs per ha)	Meets and/or exceeds Intensification Targets	15	15
2. Mixed Use Ground Related Commercial in Intensification corridors.	Provides 50% or more of street level commercial space in mixed use corridors.	15	15
3. Official Plan Affordable Housing Policies	Achieves the minimum 10 percent target for all new housing units to be affordable housing	20	20
4. Property Description	Vacant Site	10	10
	Vacant Building	5	
	Partially Vacant Building	2	
5. Type of Development	Mixed Use	15	15
6. Sustainability	<ul style="list-style-type: none"> • LEEDS • Energy Saving Measures 	5	5
7. Design	<ul style="list-style-type: none"> • Materials utilized • Contribution to heritage preservation and character of the area • Accessibility • Landscaping • Signage 	20	20
			100

APPENDIX "C"

HOUSING SPECTRUM - LEVEL OF GRANT

Emergency Housing Facilities	Transitional Housing Facilities	Social Housing	Affordable Rental Housing	Affordable Ownership Multi-Tenant Buildings (subject to review)
Development Charge Equivalent Grants				
100% DC Equivalent Grant	75% DC Equivalent Grant	50% of DC Equivalent Grant.	25% of DC Equivalent Grant	15% of DC Equivalent Grant
Application Fee Grant				
100 % Building Permit Equivalent Fees	75% Building Permit Equivalent fees.	50% Building Permit Equivalent fees.	25% Building Permit Equivalent fees.	Not Applicable
100% Planning Application Fees Grant.	75% Planning Application Fees Grant.	50% Planning Application Fees Grant.	25% Planning Application Fees Grant	Not applicable

Minutes of the General Committee Public Meeting



City of Barrie Direction Memos City Council

70 Collier Street (Box 400)
Barrie, ON L4M 4T5

April 11, 2016

16-G-066 PROPOSED COMMUNITY IMPROVEMENT PLAN (CIP) - CITY OF BARRIE (D18-BUI)

Kathy Brislin, Senior Policy Planner advised that the purpose of the Public Meeting was to review an application to amend the Official Plan submitted by the City of Barrie concerning a proposed Community Improvement Plan (CIP).

Ms. Brislin discussed slides concerning the following topics:

- The background and history associated with the proposed amendments;
- The related Provincial Planning Policy context;
- How the proposed CIP supports the 2014 - 2018 Council Strategic Plan Goals and strategic priorities;
- A map illustrating the proposed Community Improvement Area;
- The two programs associated with the proposed Community Improvement Plan;
- The general features associated with the proposed Renovation and Redevelopment Programs;
- The provisions associated with the Renovation Program;
- The Redevelopment Program delivery model;
- A hypothetical example related to the Redevelopment Grant Program;
- The proposed process; and
- The next steps in process.

PUBLIC COMMENTS

1. **Mr. Sean Mason, Sean Mason Homes** advised that he has participated on the Barrie Affordable Housing Committee and the Built Form Task Force Sub-Committee which were created to examine mechanisms for more affordable housing through evolved zoning, built form, incentives, parkland dedication fees, infrastructure and engineering standards. Mr. Mason advised that he concurs with the intent of the CIP proposal, but noted his concerns associated with the Plan only addressing the affordable rental market segment. He discussed that the Affordable Housing Committee and Built Form Task Force have focused on affordable home ownership and that he feels that the proposed CIP does not address this portion of the housing spectrum.

Mr. Mason commented that similar policies should be considered for the affordable to own segment of the market. He observed that a lot of cities are experiencing problems of providing affordable housing.

Mr. Mason discussed that he feels City's intensification policies along corridors provide an opportunity for more affordable home ownership. He expressed concern about the parity of development charges between the old City of Barrie boundaries and the annexation lands.

He commented that he feels that the proposed CIP is a good step forward and acknowledged that City needs growth along the corridors and further incentives are being considered.

City of Barrie
Direction Memos
City Council

April 11, 2016

CONTINUED 16-G-066...

2. **Mr. William Scott, Chair of the Allandale Neighbourhood Committee** commented that the committee supports the proposed provisions within the CIP that would provide incentives related to heritage properties.

Members of General Committee asked several questions and received responses from City staff.

WRITTEN CORRESPONDENCE

1. Correspondence from Cathy Kytayko, Director of Social Housing, County of Simcoe dated December 24, 2015.
2. Correspondence from Sean Mason received April 4, 2016.

Directions Memo: Director of Planning Services - note



TO: GENERAL COMMITTEE

SUBJECT: PROPOSED BUILT BOUNDARY COMMUNITY IMPROVEMENT PLAN
REPORT ON PUBLIC MEETING AND CONSULTATION

WARD: ALL

PREPARED BY AND KEY CONTACT: K. BRISLIN B.Sc., M.C.I.P., R.P.P., SENIOR POLICY PLANNER
EXTENSION # 4440

SUBMITTED BY: S. NAYLOR, MES, M.C.I.P., R.P.P., DIRECTOR OF PLANNING *S. Naylor*

GENERAL MANAGER APPROVAL: R. FORWARD, MBA, M.Sc., P. ENG.
GENERAL MANAGER OF INFRASTRUCTURE AND GROWTH
MANAGEMENT *R. Forward*

CHIEF ADMINISTRATIVE OFFICER APPROVAL: C. LADD, CHIEF ADMINISTRATIVE OFFICER *C. Ladd*

RECOMMENDED MOTION

1. That a new Community Improvement Plan (CIP) known as the Built Boundary Community Improvement Plan be approved as outlined in Appendix "A" to Staff Report PLN009-16.
2. That By-law 2016-001 adopting the Built Boundary Community Improvement Project Area be amended in accordance with Schedule "A" attached to the Built Boundary Community Improvement Plan in Appendix "A" to Staff Report PLN009-16.
3. That the additional taxes realized through increased tax assessment relating to CIP projects that are not paid to the applicant as outlined in Table A (Tax Increment Based Payment Schedule Staff Report PLN009-16) be transferred to the CIP Reserve to fund future CIP Projects.

PURPOSE & BACKGROUND

Purpose

4. The purpose of this Staff Report is to recommend approval of a new Community Improvement Plan (CIP) referred to as the Built Boundary Community Improvement Plan which proposes financial incentive programs to support the renovation of existing heritage buildings and buildings within the urban growth centre, and the provision of affordable housing, brownfield redevelopment within the built boundary, and mixed-use development in the intensification areas which include the Urban Growth Centre, and Intensification Nodes and Corridors and Transit areas identified on Schedule I to the Official Plan (Appendix "B" to staff report PLN009-16).

Background

5. On November 30, 2015, General Committee received Staff Report PLN032-15 which proposed a framework for a new Community Improvement Plan to replace the Downtown Next Wave and Allandale Community Improvement Plans, and recommended that staff undertake further consultation, including the holding of a statutory public meeting, and report back to Council in this regard.

6. Since November 30, 2015, staff have circulated the draft Built Boundary Community Improvement Plan to the Ministry of Municipal Affairs, internal departments, various developers, consultants, the Downtown BIA, neighbourhood associations, and property owners who had previously applied for incentives offered under the Downtown and Allandale CIP.
7. A statutory public meeting was held on April 4, 2016 regarding the proposed CIP as well as a public open house which was held on May 4, 2016 at City Hall.

Overview

8. This proposed new Built Boundary CIP is intended to replace and expand upon the programs offered under the existing Downtown and Allandale CIPs. The Downtown and Allandale CIPs have been in effect since 2004 and 2005 respectively and were developed with the specific objective of downtown revitalization. The CIPs and the background studies were prepared and adopted under a very different policy regime which predated the Provincial Growth Plan, the Provincial Policy Statement (including amendments thereto) and the most recent update to the City's Official Plan.
9. In June of 2006, subsequent to the adoption of the two existing CIPs, the Provincial Growth Plan came into effect and identified downtown Barrie as an Urban Growth Centre (UGC). The Growth Plan requires 40% of new growth in municipalities to occur through intensification within a "built boundary" identified by the Province, and also established population and density targets for designated UGCs. The Growth Plan also requires municipalities to identify intensification areas within their municipal boundaries.
10. As a result, the City amended its Official Plan in 2009 to identify these intensification areas which included the designated UGC. In 2013, Council received Urban Design Guidelines for these intensification areas to provide guidance for development of lands within both the private and public realm. In September of 2015, Council approved two new zone categories intended to implement these design guidelines and support intensification in delineated nodes and corridors. These new zones do not apply to the UGC as the majority of lands within this area already support intensification. Refer to Appendix "C" attached comparing the boundaries of the UGC with the Downtown and Allandale CIP Areas.
11. Other City strategic initiatives that have been approved since the Downtown and Allandale CIPs were prepared include the incorporation of updated brownfield policies into the Official Plan to govern the redevelopment of potentially contaminated lands, and the approval of an Affordable Housing Strategy to remove barriers and promote the creation of housing which meets the needs of citizens of all ages and income brackets.
12. The key objectives of the proposed CIP are to address these policy initiatives by facilitating not-for-profit and private sector development of more affordable housing units and encouraging the clean-up and development of brownfield sites within the Built Boundary and encouraging the development of intensification areas including the Urban Growth Centre and Intensification Nodes and Corridors and Transit Areas identified on Schedule I of the Official Plan (Appendix "B") as mixed use development in accordance with the desired built form and density.

ANALYSIS

Proposed Community Improvement Plan & Financial Incentives

13. The Built Boundary CIP expands the area eligible for assistance to lands shown on Appendix "B" and proposes two financial incentive programs: a Renovation Grant and a Redevelopment Grant.

Renovation Grant Program

14. The Renovation Grant Program is intended for small scale projects for existing buildings, and is intended to simplify and replace the forgivable loan programs currently available in the Downtown and Allandale CIP areas. The grant is for renovating, restoring and improving existing buildings within the Urban Growth Centre (UGC), and to support the restoration and improvement of buildings listed on the Municipal Heritage Register.
15. Staff are recommending a grant program to replace the existing forgivable loan programs to assist in removing issues associated with registration of forgivable loans as has been identified by some recipients. Through monitoring, staff have been advised that the current Downtown and Allandale forgivable loan programs create issues for owners when re-financing or transferring loans to new owners. The proposed new program is intended to resolve these issues by providing a one-time grant with a conditional agreement to be registered on title.
16. As with the current forgivable loan programs, staff are recommending that the approval of these grants be delegated to the Director of Planning Services, and be subject to annual budgetary allocation of funds.
17. Staff are also proposing that the approval of the renovation grants be subject to evaluation criteria to rank and score the merits of a project. This will assist decision making in allocation of funds.
18. The proposed CIP provides flexibility to adjust the evaluation criteria and scoring of applications in order to be responsive to changing conditions and priorities of the City, and Council's strategic objectives. These evaluation criteria will be subject to monitoring and annual reporting.

Redevelopment Grant Program

19. The Redevelopment Grant program is intended for development/redevelopment projects within the intensification areas and brownfield redevelopment and affordable housing projects within the built boundary. Redevelopment includes adaptive re-use and additions to existing buildings on eligible properties, and development of vacant lands on eligible properties. Three types of grants targeted towards each of the strategic priorities identified above are proposed under the Redevelopment Grant program which are summarized as follows:

a) Affordable Rental Housing Grant

This grant program is for affordable housing provided within the built boundary area identified on Schedule I to the Official Plan. The grant provides a onetime payment equalling a percentage of development charges, building permit fees and planning application fees for a continuum of housing types outlined as follows:

- i. Emergency housing: a payment equalling 100% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of emergency housing units developed within the project.
- ii. Transitional housing: a payment equalling 75% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of transitional units developed within the project.
- iii. Social housing: a payment equalling 50% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of social housing units developed within the project.

- iv. Rental housing; a payment equalling 25% of development charges and building permit fees applicable to affordable units, and planning fees based on the percentage of affordable rental housing units developed within the project.

b) Brownfield Redevelopment Grant

Any brownfield development/redevelopment projects within the built boundary will be eligible for a grant covering specified costs associated with site remediation, to be paid back through a Tax Increment Based Grant after the project is developed, based on the following 5 year payment schedule:

Year	Percentage of Tax Increment Grant Payment
1	100% pro-rated
2	100%
3	75%
4	50%
5	25%

c) Intensification Area Redevelopment Grant

This grant program is for development/redevelopment within the UGC, intensification nodes and corridors, and areas within 500m of transit stations identified on Schedule I of the Official Plan and subject to the requirement of providing ground floor commercial, as well as meeting the minimum density requirement and built form. A grant which is the equivalent of 50% of development charges and building permit fees for the ground related retail component of the project, and 100% of planning application fees, will be paid back through a Tax Increment Based Grant based on the chart above.

- 20. If a project encompasses all three strategic priorities, for example a proposed affordable housing project within an intensification area on a brownfield site, the three different grant programs can be combined. The Brownfield and Intensification Area Grant components will be combined and paid through the Tax Increment Based Grant. The affordable housing component will be paid in accordance with the program details for affordable housing.
- 21. In both the Brownfield Redevelopment Grant and the Intensification Area Grant, the amount of the grant cannot exceed eligible costs. Thus the Tax Increment Grant payment schedule will be stopped at the point when all eligible costs have been covered, or at the end of the five year period, whichever is the lesser of the two. Similarly, when two programs are combined, the grant cannot exceed the combined costs. The grant payment schedule will be stopped at the point when eligible costs have been covered, or at the end of the five year period regardless of whether the eligible costs exceed the payment over the 5 years.
- 22. Where DC discounts are already in place through the Development Charges By-law, the grants will be based on the greater of the two. For example, there is an existing 50% development charge discount for commercial development in the City Centre Planning Area, therefore the 50% DC component of the grant for an intensification redevelopment in this area would not be applicable unless it was calculated to be the greater of the two.

23. Staff are proposing that approval of the Redevelopment Grant applications be delegated to a Redevelopment Grant Review Group comprised of the General Manager of Infrastructure and Growth Management, the General Manager of Community and Corporate Services and the Executive Director of Invest Barrie. The Redevelopment Grant review is intended to occur in parallel to site plan review. Planning staff will provide input to the applicant on the grant eligibility at the earliest point possible including at the time of pre-consultation for site plan. Once the first submission for site plan approval is submitted, the Redevelopment Grant Review Group will consider the grant application with comments and input provided from Planning staff.
24. If supportable, conditional approval will be granted and a Grant Agreement will be required to be registered on title prior to the advancement of any funds.
25. In addition to the existing Downtown and Allandale CIPs, the City also has an existing Community Improvement Plan for the Georgian College Neighbourhood to promote the development of purpose built student housing near the college. There are no changes proposed to the Georgian College Neighbourhood CIP. The incentive for the development of student housing will continue to be available under this CIP. Since the proposed Built Boundary CIP area overlaps with the Georgian College CIP area, it is recommended that incentives under the proposed built boundary CIP may be available under either the proposed Built Boundary CIP or the Georgian College CIP. However a project may only be considered for grants under one or the other CIP.
26. There is wording in the Built Boundary CIP to clarify that the current Downtown and Allandale will only remain in effect insofar as implementation of program details for applications received up to and including April 30, 2016. This cut-off date for receipt of applications in 2016 was proposed in Staff Report PLN032-15.

Ministry and County Consultation

27. Although the City does not require approval of the Ministry of Municipal Affairs and Housing (MMAH), staff contacted and circulated a draft of the CIP to the MMAH and received comments in a letter dated May 20, 2016.
28. In addition to questions and suggestions of clarification on programs the following substantive suggestions were provided by MMAH:
 - a) In light of the County of Simcoe "Housing First" model which focuses on the development of permanent affordable housing that will accommodate a range of affordable housing needs, MMAH suggest the City provide the greatest amount of assistance to permanent housing, or provide a single set of incentives available to all affordable housing.

Comment: The variable grant amount for the continuum of affordable housing types was developed in consultation with the Built Form Task Force, and was based on housing types considered to have greater need for assistance. Based on this, staff are not recommending any change.
 - b) A protocol for appealing the CIP is suggested.

Comment: There is an opportunity for Council to hear applicant concerns thus staff are not recommending any changes in this regard.
29. Staff have been in contact with County of Simcoe and have received feedback on the proposed CIP. The County of Simcoe's primary interest is with respect to affordable housing delivery, and is supportive of the proposed CIP. The County noted some variation with their proposed definitions of affordable housing and the CIP, and suggested that consideration be given to

enhancing the incentives for social housing and affordable rental housing, and extending the period of time that units need to remain affordable.

30. Comment: Staff have met with County staff to discuss their comments. The definition of affordable housing in the CIP is consistent with that of the Official Plan and Affordable Housing Strategy and thus staff are not recommending any changes in this regard. Wording has been included in the Built Boundary CIP that allow for grant agreements to require maintaining affordable rental housing for a twenty year period.
31. Staff also discussed with County staff the potential impact of proposed legislative changes being considered currently that may impact the proposed affordable housing incentives in the Built Boundary CIP. Bill 204 – the Promoting Affordable Housing Act, 2016 was recently introduced as part of the Province’s Long-Term Affordable Housing Strategy commitment to facilitating a greater range of housing choices and increasing the supply of affordable housing. Staff will continue to monitor the status of this legislation and if necessary will recommend amendments to the Built Boundary CIP to align with the legislation if and when it is approved.

Public Meeting

32. The statutory public meeting was held on April 4, 2016. Stakeholders that had expressed an interest in the proposed CIP were circulated notice of the public meeting and notification was published in the newspaper and on the City website with linkages provided to the November 30, 2015 Staff Report PLN032-15, the Draft Built Boundary CIP, and presentation materials.
33. Mr. Sean Mason provided comments at the meeting expressing concern that the grants were not being proposed for affordable home ownership, only for rental projects. Staff do not consider the CIP the appropriate tool for supporting affordable home ownership. Unlike rental housing, it is difficult to ensure the affordability is maintained for ownership models over time. Affordable home ownership is considered important in the spectrum of affordable housing, and the City has established a Built Form Task Force to explore other options to support affordable home ownership. Some matters being reviewed include reduced development and zoning standards, decreased or elimination of development charges and streamlining the review process to expedite and prioritize developments offering affordable ownership.
34. Mr. Bill Scott of the Allandale Neighbourhood Association commented that he is supportive of the proposal to provide incentives to renovate or restore existing buildings within the Urban Growth Centre and buildings listed on the municipal heritage register.
35. Mr. Paul Lynch suggested that the Renovation Grant should focus on significant improvements that increase the opportunities and availability of office space. He suggested that the grant amount should be increased to capture such significant improvements, and identified certain types of improvements (such as painting over brickwork, stucco or application of siding) should not be eligible for the renovation grant. Mr Lynch also suggested evaluation criteria be simplified, and the focus should be on square footage improved for office space rather than type of jobs. Planning staff, Invest Barrie and Economic Development Services staff met with Mr. Lynch on May 18, 2016 to discuss his comments, and provided clarification as to the difference in the existing Downtown CIP and proposed Built Boundary which addressed some of his concerns. Staff are not recommending changes as the CIP provides for changes to the evaluation criteria from year to year and the evaluation criteria as currently proposed are aligned with economic development objectives.
36. Ms. Kris Menzies of MHBC submitted an email requesting clarification on the eligibility for lands covered by an intensification node, but not within the built boundary areas. Wording has been included in the draft CIP to clarify eligibility developments within the built boundary or Intensification Nodes and Corridors. As a result, staff are recommending an amendment to By-

law 2016-001, which adopted the Community Improvement Project Area map, such that the Intensification Node at Yonge Street and Maplevue Drive does not extend south of Maplevue Drive.

Open House

37. An open house was held on May 4, 2016, and approximately 25 people attended over the course of the evening. Attendees included developers, ratepayers, downtown business interests, and County staff. The following questions were raised at the Open House:

a) Clarification on the definition of "Affordable Rental".

Comment: Staff provided clarification that the definition of Affordable Housing has been identified in the City's Official Plan and Affordable Housing Strategy which is sufficiently general to adapt to the specific County, regional and City conditions over time.

b) Suggestion that the grant available for Affordable Rental Housing should be enhanced, as it does not provide sufficient incentive to support affordable rental housing development.

Comment: The variable grant amount for the continuum of affordable housing types was developed in consultation with the Built Form Task Force, based on housing types considered to have greater need for assistance. Based on this, staff are not recommending any changes.

c) Clarification on the area of application and eligibility for Redevelopment Grants for listed buildings.

Comment: Staff clarified that listed buildings within the built boundary outside of the Urban Growth Centre would be eligible for the Renovation Grant.

d) Whether the Tax Increment Based Grant payment can be transferrable so that financing companies can use Tax Increment Based Grants as securities to offer developers financing based on conditional approvals.

Comment: Staff are not recommending wording to allow for transfer of grants to third parties however, the CIP does provide for transfer of grants where ownership changes subject to approval of the Redevelopment Review Group and an amendment to the Grant Agreement.

ENVIRONMENTAL MATTERS

38. The Redevelopment Grant program for brownfield costs will facilitate clean up and redevelopment of vacant contaminated sites and support soil and water quality improvement.

39. The proposed evaluation criteria include the opportunity to add scoring points for Leadership in Energy and Environmental Design (LEED) or equivalent design and development attributes.

ALTERNATIVES

40. There are two alternatives available for consideration by General Committee:

Alternative #1 General Committee could refuse the proposed Built Boundary CIP and maintain the current Downtown and Allandale CIP programs.

This alternative is not recommended. The proposed Built Boundary CIP is intended to address multiple strategic priorities of Council, including the provision of affordable housing, brownfield redevelopment and incentives for development within the City's intensification areas as identified on Schedule I to the Official Plan.

Alternative #2 General Committee could recommend revisions to the proposed Community Improvement Plan with any variations to the programs being offered, such as increasing the amount available for affordable rental housing.

The programs and program details have been developed and refined with input from internal departments and the Built Form Task Force. The uptake of affordable housing incentives as recommended may be monitored and reconsidered at a later stage in conjunction with proposed changes in the legislation as a result of introduction of Bill 204 the Promoting Affordable Housing Act, 2016.

FINANCIAL

Funding of Proposed Renovation Grant Program

41. Staff recommend that these grants be funded in a similar way to the current small forgivable loans through an annual budgetary process. Stable predictable funding would facilitate administration of this program. In review of past years for small grants and forgivable loans, the annual budgetary amount assigned has been between \$150,000 and \$250,000 for forgivable loans and small grants. For the past five years, the full amount has been allocated to applications received by the end of the summer of any year. New applications received after that date are held for consideration in the following year subject to budgetary approval.
42. If funding is approved, staff would be in a position to commence processing Renovation Grants under the proposed Built Boundary CIP in 2017.

Funding of Redevelopment Grant Program

43. Emergency Shelters and Transition Housing Grants are proposed to be paid at the time of building permit application, whereas grants for social housing and affordable rental housing are paid after the building is developed and 50% occupied. Thus funding would be required earlier in the process for Emergency Shelters and Transition Housing Grants. Staff are not aware of any proposed emergency shelters or transition housing development at this time, however, it is possible that with the proposed incentives in place, the City may receive an application for any one of these types of affordable housing projects. Until such time as sufficient funds are available in the CIP reserve fund to cover the grant payments, Council approval of funding will be necessary before any such CIP applications can be approved.
44. Redevelopment Grants that are funded through the tax increment based program would be paid after the development is completed and the increased taxes are paid. It is likely that any projects considered and approved in 2016 under this program would need to be paid in 2018 at the

earliest. Thus there is no direct budgetary impact to be considered for this type of project at this time.

- 45. Since the CIP reserve would not have been built up through tax increment grants by 2017, funds will be needed for Affordable Housing Grants that may be received in 2016 and 2017. While staff are not aware of any proposals at this time, it will be suggested that some funds be set aside in the CIP reserve for this type of project in the 2017 budget.
- 46. Staff are recommending that a percentage of taxes collected from a project approved under the proposed CIP Tax Increment Grant program be allocated to the CIP reserve account in order to build up this account. As shown on the table below, a percentage would be paid out to cover costs of development and the remaining percentage would be placed in the account to fund future affordable housing projects that need a direct grant, or that would benefit from some front end funding.

TABLE A – Tax Increment Based Payment Schedule

Tax Increment Grant Payment to Applicant	Tax Increment Revenue Allocated to the Redevelopment Grant for Future Projects Needing Front End Funding
Year 1 – 100% pro-rated	0%
Year 2 – 100%	0%
Year 3 – 75%	25%
Year 4 – 50%	50%
Year 5 – 25%	75%

- 47. The effect would be that the additional taxes realized through increased assessment for CIP projects would be paid to the applicant or kept in a reserve account to finance future projects for the first 5 years as outlined in the table above.
- 48. Until such time as sufficient funds are available in the CIP reserve fund through diverting a portion of the increased taxes from the Tax Increment Grant approved projects, the reserve fund would require an annual budgetary allocation. In cases where an application is received and there is no budgetary allocation for these applications, funding approval will require Council consideration.

LINKAGE TO 2014-2018 STRATEGIC PLAN

- 49. The recommendations included in this Staff Report support the following goals identified in the 2014-2018 Strategic Plan:
 - Responsible Spending
 - Inclusive Community
- 50. The expenditure of public funds to target outcomes and achieve growth management and planning and development objectives that may otherwise be difficult to achieve given barriers to development in the built boundary.
- 51. Incentives are proposed at different levels to encourage a spectrum of affordable housing types which supports an inclusive community.

Attachments: Appendix "A" – Built Boundary – Community Improvement Project Area
 Appendix "B" – Schedule I to the Official Plan
 Appendix "C" - Comparison of UGC Boundary and Allandale and Downtown CIPs
 Appendix "D" – Comparison of Proposed Built Boundary CIP and Downtown/Allandale CIPs

APPENDIX "A"
BUILT BOUNDARY – COMMUNITY IMPROVEMENT PLAN

PART A: PREAMBLE

1.0 Background

The Provincial Growth Plan identifies Downtown Barrie as an Urban Growth Centre (UGC). Intensified mixed use development including residential, office, commercial and institutional uses are contemplated at densities of 150 persons and jobs per hectare in the UGC. The Growth Plan also sets population targets and requires at least 40% of new growth to be accommodated within the built up area.

In 2009, the City prepared an Intensification Study which identified key intensification areas including the UGC, mixed use nodes and corridors along major arterial roads, intersections and areas within walking distance of transit stations. Urban Design Guidelines were prepared in 2013 for these key intensification areas to provide guidance for development of private and public realm lands in these areas. Two new zone categories for the Intensification Nodes and Corridors have also been approved by Council to implement the type of development envisaged for these areas.

In addition, Council approved an Affordable Housing Strategy in February 2015 which included direction to develop incentives for the provision of affordable housing.

Finally, in 2010 Council approved a Brownfield strategy which included a recommendation to develop financial incentives to facilitate the rehabilitation of potential brownfield sites within the City.

The purpose of this Community Improvement Plan (CIP) is to facilitate the development of more affordable housing units; to encourage the clean-up and development of brownfield sites; and to encourage development of mixed use nodes and corridors, and other intensification areas within the City's Built Boundary as designated on Schedule I of the Official Plan.

2.0 Basis

The City of Barrie Official Plan currently contains provisions regarding Community Improvement Planning which provides that any area within the City of Barrie (exclusive of the lands annexed into the City in 2010) may be designated a Community Improvement Project Area pursuant to Section 28 of the Planning Act.

In addition, Section 3.6.2.4 of the Official Plan states that Community Improvement Plans may provide direction, guidelines and a strategy for a number of matters, not limited to:

- a) Allocation of public funds such as grants, loans, tax assistance or other financial instruments for the physical rehabilitation, redevelopment or improvement of land and buildings, to registered owners, assessed owners, tenants and assignees of lands or buildings.
- b) Municipal acquisition or holding of land or buildings and subsequent clearance, grading, rehabilitation, redevelopment or resale of these properties or other preparation of land or buildings for community improvement.
- c) Public/Private Partnerships, joint ventures and cost-sharing arrangements.
- d) To achieve a variety of planning, development, growth management, transportation and health and safety and community objectives.

This Community Improvement Plan arises from several converging considerations which are summarised as follows:

- a) The need to assess the current Downtown, Allandale and Georgian College CIP's, in light of the fact, that they were developed prior to the Places to Grow Provincial Growth Plan (henceforth Growth Plan) came into effect.
- b) Council direction for staff to explore opportunities for a sustainable source of funding of the CIP financial incentives (Motion 10-G-257).
- c) Development of incentives for brownfield redevelopment as part of a Brownfield Strategy.
- d) Review of incentives for Affordable Housing as recommended in both the Affordable Housing Strategy and the Built Form Task Force Report.
- e) Investigation into potential incentives for Intensification Nodes and Corridors, to mitigate the cost of development, subject to zoning approval of zoning for mixed use nodes and corridors. (Incentives PLN002-15)(15-G-022)(Mixed Use Zoning PLN018-14)

3.0 Authority - Section 28 of the Planning Act

Authority for the provision of financial incentives is provided by Section 106 of the Municipal Act RSO 2001 and Sections 28(6) and (7) of the Planning Act.

Section 28(1) of the Planning Act defines a "community improvement project area" as "an area within a municipality, the community improvement of which in the opinion of the council is desirable because of age, dilapidation, overcrowding, faulty arrangement, unsuitability of buildings or for any other environmental, social or community economic development reason".

Schedule "A" attached of this Plan constitutes the Community Improvement Project Area which was designated by By-law 2016-001 on January 11, 2016

For the purposes of developing and implementing a CIP, a municipality may engage in the following activities within the Community Improvement Project area:

- a) acquire, hold, clear, grade or otherwise prepare land for community improvement;
- b) construct, repair, rehabilitate or improve buildings on land acquired or held by it in conformity with the CIP ;
- c) sell, lease, or otherwise dispose of any land and buildings acquired or held by it in conformity with the CIP ; and,
- d) make grants or loans to the registered owners, assessed owners, and tenants of lands and buildings to pay for the whole or any part of the cost of rehabilitating such lands and buildings in conformity with the CIP.

PART B: THE COMMUNITY IMPROVEMENT PLAN

1.0 Purpose

The purpose of the new Community Improvement Plan will be to provide for Financial Incentives designed to achieve emerging community goals and priorities which target key planning and growth management objectives for development within the Built Boundary, including: affordable housing, brownfield redevelopment, and mixed-use development within the intensification areas identified on Schedule I of the Official Plan.

2.0 Community Improvement Project Area

The Community Improvement Project Area includes all of the Built Boundary as identified on Schedule I of the Official Plan. The Built Boundary Community Improvement Project Area is shown on Schedule A of this CIP.

3.0 Objectives

The objectives of this plan are as follows:

1. To support the provision of a variety of affordable housing by offering different levels of support for a continuum of affordable housing options.
2. To facilitate the redevelopment and remediation of brownfield sites.
3. To reinforce the vision for development of the Intensification areas with more intensive mixed use development, by offering incentives to support the development of street level commercial uses in the Intensification areas.
4. To facilitate renovation restoration and adaptive reuse of existing buildings in the Urban Growth Centre and buildings included on the Municipal Heritage Register.

4.0 Community Improvement Financial Incentives

In order to assist the City in achieving these objectives, this CIP will provide incentives in the form of two major programs; a renovation grant program and a redevelopment grant program.

The *Renovation Grant Program* is intended to provide financial incentives to promote the renovation and restoration of existing buildings within the Urban Growth Centre and buildings listed on the Municipal Heritage Register.

The *Redevelopment Grant Program* will provide financial incentives for development/redevelopment projects which provide affordable housing; remediate and redevelop brownfield sites within the Built Boundary, and develop ground related commercial in combination with the appropriate density and built form to support transit, walkability and animated streets in the intensification areas identified on Schedule I on the Official Plan.

5.0 General Eligibility Requirements for Incentive Grant Programs

1. The property must be within the Built Boundary Community Improvement Project Area, the Urban Growth Centre, an Intensification Node or Corridor as identified on Schedule "A" to this CIP.

2. All applications for assistance will be considered subject to the availability of funding.
3. Any owner of a property, within the Built Boundary Community Improvement Project Area, may apply for assistance, unless stated otherwise in the Specific Eligibility Criteria for grants and loans.
4. An owner or tenant of a residential condominium unit or condominium development shall not be eligible for any of the grants or loans available under this CIP unless otherwise stated in the program details.
5. Improvements shall be made to buildings or land in accordance with the purpose and the objectives of this CIP, the Official Plan, the Zoning By-Law and other municipal By-laws in effect.
6. Expansion, enlargement or improvements of existing legal non-conforming uses shall not be eligible. However, where improvements are proposed to bring uses into closer conformity with the intent of the Official Plan and Zoning By-Law, or Building Code, such improvements may be considered for a grant or loan under this CIP.
7. The property under consideration shall not be in a position of property tax arrears, or shall have a payment schedule acceptable to the City Treasurer at the time of application.
8. The total of the grants and loans made in respect to particular lands and buildings shall not exceed the eligible cost of the improvements with respect to those lands and buildings.
9. Improvements to auto related uses including drive through facilities, auto repair shops, car detailing, car dealerships, sales and leasing of automobiles, gas stations or any other auto related uses shall not be eligible for any grant or loan available under this CIP.
10. Temporary uses, such as temporary sales offices; scaffolding or other non-permanent structures, such as tents; temporary storage areas; temporary parking lots, or properties zoned under temporary use provisions of Section 39 the Planning Act shall not be eligible.

6.0 Renovation Grant Program

6.1 Purpose of the Renovation Grant

The purpose of this grant is to assist in the improvement, restoration or adaptive re-use of existing buildings within the Urban Growth Centre and to assist with restoration and renovation of heritage characteristics of buildings listed on the Municipal Heritage Register.

6.2 Specific Eligibility Requirements of the Renovation Grant

The renovation grant is available to property owners that meet the following eligibility requirements:

1. Buildings within the Urban Growth Centre identified on Schedule "A" attached to this CIP.
2. Buildings within the Built Boundary listed on the Municipal Heritage Register as updated from time to time.
3. Eligible renovations include interior and exterior renovations or improvements such as:

- a) Adaptive re-use; upgrade to building code; accessibility and HVAC improvements and façade and sign improvements.
- b) Restoration and renovation of the interior or exterior of buildings listed on the Municipal Heritage Register.
- c) Improvements that result in increased energy efficiency of buildings.

6.3 Calculation and Timing of Payment of the Renovation Grant

1. Where an application is approved under this program, assistance will be in the form of a grant for 50% of the eligible renovation costs to a maximum of \$25,000 per property, whichever is the lesser.
2. Approval will be conditional upon the works being completed within a year of approval. If works are not completed within the specified time frame, approval will be withdrawn unless the applicant has requested and received written approval for the extension from the Director of Planning Services.
3. A Renovation Grant Agreement between the City and the owner shall be executed and registered on title prior to release of funds for the grant.
4. Grants will be paid at the time of completion of the works and after at least 50% occupancy of the building is confirmed.
5. From time to time the upset maximum for the renovation program may be changed through a resolution of Council, based on monitoring of uptake, without requiring an amendment to this plan.

6.4 Renovation Grant Program Delivery and Process

1. Approval of the Renovation Grant is delegated to the Director of Planning Services.
2. Applications for grants under this program will be required to be submitted within a prescribed time frame for consideration.
3. Only complete applications will be considered.
4. Eligibility criteria, evaluation criteria and if applicable priority streets will be stipulated on an annual basis.
5. Evaluation criteria shall be applied to assist in selection and approval of eligible projects and shall take into account the following considerations:
 - a) The proposed improvements result in increased occupancy of existing building within the UGC. Rankings will be based on the provision of ground floor commercial uses with second and third story residential and/or employment uses.
 - b) The proposed improvements result in the renovation/restoration of existing building on the municipal heritage registry.
 - c) The improvements result in a net increase to the employment and residential base of the Urban Growth Centre.

- d) The improvements result in a net increase to the availability of office and residential space on upper floors.
- 6. Evaluation criteria and scoring of grant applications may be amended on an annual basis.
- 7. Following the closing date the list of applications and details of the proposals will be made available to the Director of Planning Services who shall evaluate applications against the criteria referenced above.
- 8. More than one intake per year may be considered at the discretion of the Director of Planning Services subject to uptake and funding availability in any one year.

7.0 Redevelopment Grant Program

7.1 Purpose of the Redevelopment Grant Program

The purpose of the Redevelopment Grant Program is to provide financial incentives for (re)development which entails any of the following:

- 1. The provision of a variety of affordable housing.
- 2. The development of the Intensification Areas in with the density, mix of uses and built form required in accordance with the Official Plan and Zoning By-law.
- 3. To support the redevelopment of Brownfield sites within the built boundary

7.2 Specific Eligibility Requirements of the Redevelopment Grant

- 1. Affordable Housing:
 - a) A development or redevelopment which provides affordable housing within the Built Boundary or within an Intensification Node or Corridor outside of the Built Boundary as identified on Schedule A of this CIP.
 - b) Those units within a development or redevelopment that meet the Affordable Rental Housing definition will only be eligible for the grant.
 - c) Affordable rental housing defined as the least expensive of:
 - i) A unit for which the rent does not exceed 30 percent of the gross annual household income for low and moderate income households; or
 - ii) A unit for which the rent is below the average market rent of a unit in the regional market area.
- 2. Intensification Area Redevelopment:
 - a) Properties or a consolidated group of properties or buildings with a minimum of 100m frontage on a road forming an Intensification Corridor or on one of the intersections forming an Intensification Node, within the Community Improvement Project Area Map - Schedule A.
 - b) Properties or buildings within or partially within the Urban Growth Centre.
 - c) Properties or buildings within 500m of a Transit Station.

- d) Projects shall comply with applicable official plan policies including densities and density and zoning requirements.
 - e) Properties within the Mixed Use Nodes and Corridors shall be required to comply with the City's Mixed Use Nodes and Mixed Use Corridor zoning standards. In addition the applicable Intensification Area Urban Design Guidelines shall be included in the design.
 - f) This grant shall only be provided where the full amount of commercial is developed as required in the zoning by-law. In the case of Intensification Corridors at least fifty percent of the ground floor shall be developed for commercial use to qualify for the grant. A lesser percentage of ground related commercial will not be eligible.
 - g) The commercial use shall be provided in combination with residential development and shall meet the applicable density requirements; single story commercial development shall not be eligible for this grant program.
3. Brownfield Redevelopment:
- a) Redevelopment of brownfields within the Built Boundary, or is within an Intensification Node or Corridor outside the Built Boundary as identified on Schedule "A" attached to this CIP.
 - b) For purposes of this CIP, a brownfield site is a property or part of a property with or without buildings having a history of either industrial or commercial uses and which as a result of these uses has become environmentally contaminated and remediation is needed in order to develop the site for a sensitive use.

7.3 Calculation and Timing of Payment of the Redevelopment Grant

7.3.1 Affordable Housing:

1. The value of the Affordable housing Grants will vary based on the type of affordable housing being considered: Emergency Housing; Transitional Housing; Social Housing and Affordable Rental Housing. Refer to Appendix B to this CIP for definitions of these types of affordable housing.
2. The grants are for the equivalent costs of a percentage of the applicable Development Charges (DC's) as well as a percentage of Building Permit and Planning Application Fees. The value of the grants for different types of affordable housing is outlined as follows:
 - a) Emergency housing: a payment equalling 100% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of emergency housing units developed within the project.
 - b) Transitional housing: a payment equalling 75% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of transitional units developed within the project.

- c) Social housing: a payment equalling 50% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of social housing units developed within the project.
 - d) Rental housing: a payment equalling 25% of development charges and building permit fees applicable to affordable units, and planning fees based on the percentage of affordable rental housing units developed within the project.
3. For purposes of determining the applicable equivalent grant costs the following shall apply:
- a) Development Charges Equivalent grants are based on the applicable percentage of the Development Charges required in accordance with the Development Charges by-law in effect at the time.
 - b) Building Permit Fees Equivalent grants are based on the full building permit fee required at the time of building permit application. The building permit fees equivalent grant shall not include conditional building permit fees, unless this fee is approved by the Grant Review Group.
 - c) Planning Application Fees Equivalent grants include all application fees applicable to planning processes, including:
 - i. Pre-consultation request forms; application fees for site plan, rezoning, official plan amendments, severance, minor variance, or other planning application process, relevant to the type of affordable housing being proposed on a specific site.
 - d) Planning Application Fees Equivalent grants shall not include security deposits, or letters of credit normally required through the planning process.

7.3.2 Intensification Area Redevelopment:

- 1. The following development costs for the commercial component will be paid back through a tax increment based grant:
 - a) 50 percent of Development Charges for the ground related commercial component of the project.
 - b) 50 percent of Building Permit Fees for the ground related commercial component of the project.
 - c) 100 percent of Planning Application Fees for the entire project.

7.3.3 Brownfield Redevelopment:

- 1. The following costs associated with Brownfield redevelopment will be paid back through a tax increment based grant:
 - a) Costs of preparation of a Phase II and III Environmental Site Assessment, or
 - b) Costs to prepare a Risk Assessment to Table 2 Standard
 - c) Costs of Preparing a Remediation and Monitoring Plan

- d) 50 percent of costs of rehabilitating the property to permit a record of site condition to be filed with the Ministry of the Environment and Climate Change, and
 - e) 50 percent of the cost of complying with a certificate of property use issued under section 168.6 of the Environmental Protection Act.
2. Only those remediation costs incurred after the execution of an agreement with the City will be eligible for rebate. Remediation costs that have previously been incurred by the applicant are not eligible for the program funding.
 3. These studies shall be done by a Qualified Person as required under the applicable legislation.

7.4 Redevelopment Grant Payment

7.4.1 Affordable Housing:

1. The grant for affordable housing will be paid out at different times depending on the type of affordable housing developed. The timing of the grant payment for the different types of affordable housing is outlined as follows:
 - a) Emergency Housing and Transitional Housing:
 - The applicable percentage of Development Charges Equivalent, Building Permit Fees Equivalent and Planning Application Fees Grant will be paid at the time of building Permit application.
 - b) Social and Affordable Rental Housing:
 - The applicable percentage of Development Charges Equivalent, Building Permit Fees Equivalent and Planning Application Fees are to be paid by the applicant when required and the total grant is paid after the project is completed and at least 50% occupancy is confirmed.
2. Affordable Housing Redevelopment Grants shall be paid from a CIP reserve fund.
3. In the case of Emergency Housing and Transition Housing, the Affordable Housing Grant payment will be transferred from the CIP reserve fund into the applicable Development Charges, Building Permit Fees, or Planning Application Fees account at the time these will be required under the program.
4. In the case of Social Housing and Affordable Rental Housing, the applicant shall pay the applicable development charges, building permit fees or planning fees at the time required, and the grant will be paid from the CIP reserve account when 50% occupancy of the building is confirmed.
5. In all cases an agreement shall be in place confirming the affordable tenancy which shall be retained as such for a period of 20 years from the date of payment of the grant.

7.4.2 Intensification Area and Brownfield Redevelopment:

1. The total eligible costs for Intensification Area redevelopment and Brownfield redevelopment shall be paid through a Tax Increment Based Grant upon re-assessment of the property after redevelopment has occurred.
2. The repayment will occur over a maximum period of 5 years.
3. The total payment through the tax increment based grant shall not exceed the costs specified. If the costs exceed the tax increment based grant for the project the limit shall be established by the 5 year tax increment based grant payment schedule.
4. The annual grant will be equal to a percentage of the tax increment paid for the City's portion on the property taxes, in decreasing percentages of the increment as follows:

Year	Percentage of Tax Increment	Percentage to CIP Reserve
1 (pro-rated)	100%	0
2	100%	0
3	75%	25%
4	50%	50%
5	25%	75%

5. If the sum of eligible costs is less than the total paid out over the 5 year period, then the repayment schedule shall be ended when the full amount of eligible costs is paid out. The final year payment would then not need to be based on the percentage amount set out in the above Table.
6. If the eligible costs exceed the amount paid out by the end of the 5 year period no further payments will be made.
7. The tax increment shall be calculated as the difference between:
 - a) the annualized municipal taxes resulting from the increased assessment from project completion, as provided by Municipal Property Assessment Corporation (MPAC), adjusted if applicable by subsequent assessment appeal decisions, and
 - b) the annualized municipal taxes based on assessment the day before the effective date of the assessment increase noted in (a) above.
8. Where properties that are not subject to taxes are redeveloped, the base tax shall be based on the tax that would be applied to the land and buildings based on the current use. For example, a municipal property or church converted to a commercial use shall not have a zero base tax from which to calculate the tax increment.
9. The grant for Year 1 will be pro-rated based on the effective date for the increased assessment.
10. This program does not exempt property owners from increases or decreases in municipal tax rate changes relating to provincial capping legislation or from changes in assessment for any other reason.
11. The starting point for taxes levied on cleared or partially cleared parcels shall be based on the municipal taxes levied the day before clearance.

7.5 Redevelopment Grant Program Delivery and Process

1. Approval of all redevelopment grants shall be delegated to a Redevelopment Grant Review Group comprised of the General Manager of Infrastructure and Growth Management, the General Manager of Community and Corporate Services, and the Executive Director of Invest Barrie.
2. All applicants for financial assistance will be required to complete an application form outlining the location of the property, the type and nature of the improvements or development to be undertaken, the anticipated completion date, the estimated value of the project and the financial incentives applied for.
3. A grant application shall be submitted at the time of Site Plan application and will be reviewed in parallel to the Site Plan application.
4. Staff may provide feedback on a redevelopment grant application at the Site Plan Pre-consultation stage, at which time basic eligibility will be determined in conjunction with the Planning Department review.
5. Planning staff will evaluate the grant application for compliance with eligibility requirements and circulate the grant application for comments to applicable departments and provide a summary of comments to the landowner.
6. Upon receipt of an amended Site Plan to address the comments and recommendations from the Site Plan review, the landowner will submit a final grant application with amended Site Plan requirements including enhanced requirements for the grant application.
7. All projects are subject to funding availability, in consultation with Finance.
8. If approved, conditional approval shall be granted and a Redevelopment Grant Agreement shall be prepared. The legal fees for this agreement and costs of registration on title may be recovered from the grant or may be added to the eligible costs funded through the tax increment.
9. A project may be eligible for more than one of the incentives under the Redevelopment Grant Program where all the elements are included. In these instances the incentives may be added on to each project however, the total maximum amount of all grants or loans shall not exceed the total cost of redevelopment.
10. Where planning applications fees are costs permitted in more than one grant (for example Affordable Housing within an Intensification area) this grant shall be paid through the Tax Increment Based Grant, rather than an application fee equivalent grant.

7.6 Prioritization of Affordable Housing

1. Generally, developments within the Intensification areas shall be required to meet the applicable Official Plan and Zoning standards, including density, built form, and urban design requirements.
2. Where special planning approvals are needed to facilitate the provision of affordable housing projects that do not meet all these requirements, Council shall have an

opportunity to determine eligibility for the applicable Affordable Housing Redevelopment Grant Program in light of the special provisions needed to permit the affordable housing project, at the time of consideration of the planning application.

8.0 Renovation and Redevelopment Grant Program Rules and Requirements

1. The provision of any grant as described in Part B of this CIP shall be administered on the basis of merit and the limit of funding available in accordance with administrative rules governing the loan or grant programs.
2. Specific details regarding the grants, application and administration procedures shall be set out in the Grant Application Forms and may change from time to time without the need for an amendment to this Community Improvement Plan.
3. Terms and conditions of any incentive program, including interest, repayment terms and administrative procedures may be changed, altered, amended or modified by the City of Barrie without the necessity of an amendment to this CIP.
4. Any of the foregoing Grant Programs may be structured as loans or forgivable loans if necessary, to secure City interests.
5. Development or redevelopment carried out prior to approval of *The Built Boundary CIP* shall not be eligible for funding.
6. Eligible costs for redevelopment or improvements incurred prior to an application under *The Built Boundary CIP* shall not be eligible for funding.
7. Where DC discounts are already in place through the Development Charges By-law, the grants will be based on the greater of the two.
8. Incentive programs will be available to a property owner only. The City may extend the original grant payment schedule to a new owner subject to an amended agreement with the new owner.
9. Tax Increment based grant payments to the original owner will cease if the original owner sells the property prior to payment of all installments per the Tax Increment Based Grant Schedule, and the Grant has not been transferred or assigned through an agreement to the new owner.
10. Assistance granted under any financial incentive program for a particular applicant is not transferable to any other property.
11. All applicant(s) will be required to enter into an agreement with the City of Barrie specifying the amount to be paid by the City and the payment period. In all cases, the property owner must consent to the agreement in writing.
12. Eligible properties and buildings shall have no outstanding charges, legal claim, lien or tax arrears that may affect title to the land.

9.0 Municipal Acquisition, Disposal, Investment, Holding or Clearance of Land

1. In some instances, such as the provision of affordable housing, direct action on the part of the municipality may be appropriate to realize the objectives as outlined in Part B Section 3.0 of this plan.

2. Council may undertake any or a combination of the following as set out in Section 28(3) of the Planning Act:
 - a) Acquire land within the Built Boundary Community Improvement Project Area without the approval of the Minister, after the CIP is approved;
 - b) Hold land acquired within the Built Boundary Community Improvement Project area; and
 - c) Clear, grade, or otherwise prepare the land for community improvement.
3. Council may also undertake any or a combination of the following as set out under Sections 28(6) of the Planning Act:
 - a) Construct, repair, rehabilitate or improve buildings on land acquired or held by the municipality in the Built Boundary Community Improvement Project Area in conformity with the CIP and sell, lease or otherwise dispose of any such buildings and land appurtenant thereto.
 - b) Sell, lease or otherwise dispose of any land acquired or held by the municipality in the Community Improvement Project Area for a use in conformity with the CIP.
4. The City may prioritize lands or areas for undertakings as described in 2 and 3 above.
5. As part of exercising the powers granted under Section 28 of the Planning Act, the City shall prepare a report available for the public which will outline the following:
 - a) Identification and description of the strategies to be employed.
 - b) The purpose and objective of the undertaking.
 - c) The role of the municipality and other parties in the undertaking.
 - d) The financial implications for the municipality.
 - e) The potential timing of the undertaking.

10.0 Implementation

1. The Built Boundary CIP will be implemented through the provisions of Section 3.6 of the Official Plan and Section 28 of the Planning Act, 1990, R.S.O.
2. Overall implementation of the grant program shall be subject to Council review and approval of program details and budgetary allocation.
3. Approval of grants would be delegated to City staff. In the case of Renovation Grant Program, this shall be the Director of Planning Services. In the case of the Redevelopment Grant Programs, this shall be delegated to an interdepartmental panel of senior staff comprised of the General Manager of Infrastructure and Growth Management, the General Manager of Community and Corporate Services and the Executive Director of Invest Barrie. This group is referred to as the Redevelopment Grant Review Group in this document.

4. All programs outlined in Part B of this Community Improvement Plan may be upon funding approval of this Plan, after approval of this CIP. Retroactivity of the program prior to approval shall not apply.

11.0 Administration

1. The *Built Boundary CIP* and the *Financial Incentives Programs* shall be administered by the City of Barrie Planning Services and Finance Departments.

12.0 Other Community Improvement Plans:

1. The Downtown: Next Wave Community Improvement Plan and the Allandale Community Improvement Plan only apply insofar as review and implementation of applications received up to and including April 30, 2016. Any current grants or forgivable loans offered under these programs will continue to be maintained in accordance with the program details of these Community improvement plans.
2. The Georgian College Community Improvement Plan provides specialised grants for developments providing student housing. The Georgian College CIP shall remain in effect. Applications within the Georgian College CIP area may either be made under this Built Boundary CIP or the Georgian College CIP; however, applications may only be eligible under one of these CIPs. If applications are submitted under one CIP, it will be ineligible to apply under the other CIP.

13.0 Financing of Incentives

1. Council may approve an annual budget for these incentive programs.
2. The balance of the percentage paid out through the Tax Increment Based Grant Programs may be assigned to a CIP Reserve fund in order to build up funds and to have funds available for the Affordable Housing Grants, where these are to be paid at the front end.
3. All of the programs described in Part B and further detailed in Appendices are to be funded by the City of Barrie or in conjunction with such other Federal or Provincial programs which may be available.

14.0 Monitoring and Revisions to the CIP

Records of all grants and incentives awarded shall be maintained and the following shall be documented:

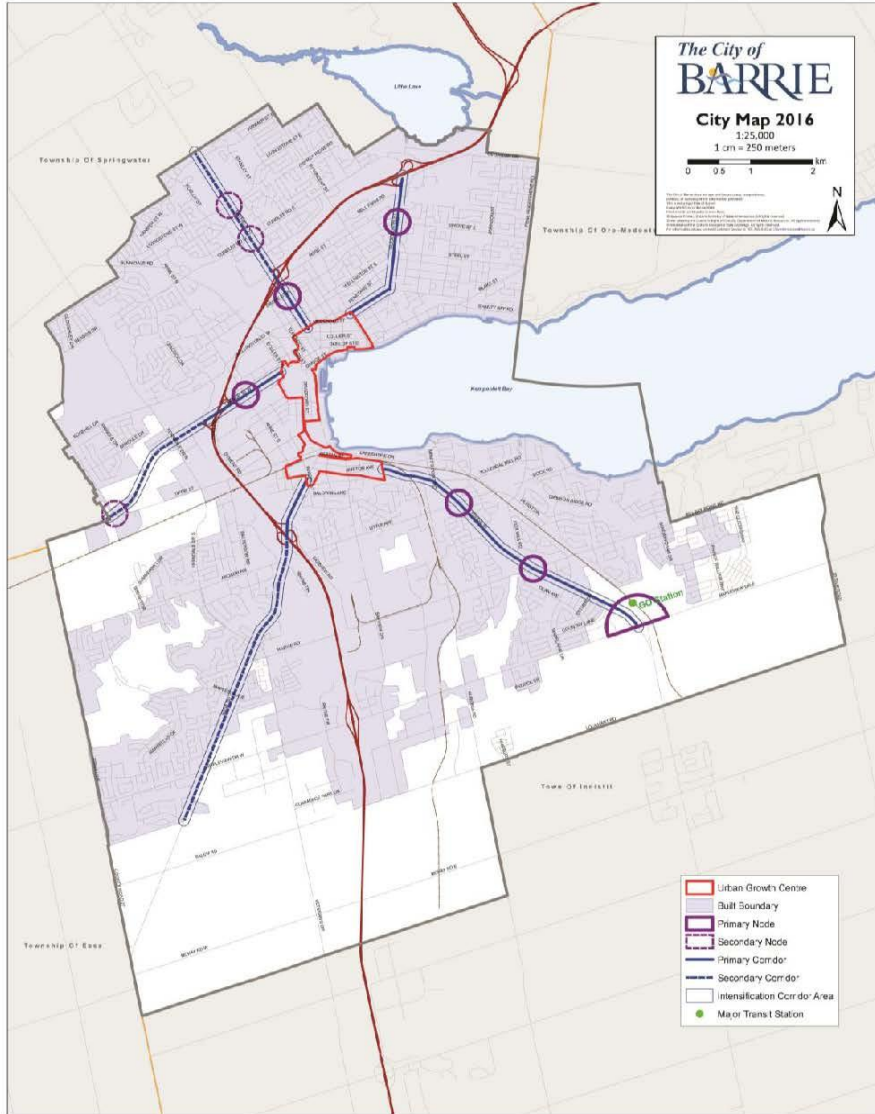
1. Renovation Grant:
 - a) Number and location of grants
 - b) Number of jobs or units added
 - c) Floor area of ground related commercial added.
 - d) Number and location of listed properties upgraded.
2. Redevelopment Grants:
 - a) Number and type of Development or Redevelopment Projects (based on the Continuum of Affordable Housing Units provided through the program.
 - b) Value of loans for development ground floor commercial space.
 - c) Additional commercial floor area
 - d) Floor area of additional office space added.

3. Annual reviews and tracking of programs and activities relating to the Built Boundary CIP shall be submitted to Council.
4. As a result of this review; terms, conditions and details of any grant program may be changed, altered, amended or modified by the City of Barrie with direction from Council.
5. The addition of a new grant or loan program shall require an amendment to this CIP; however, the City of Barrie may discontinue any program without requiring an amendment to this Plan.

15.0 Interpretation

Part B Sections 1 to 20 inclusive and Schedule "A" attached, unless otherwise stated, shall form the Built Boundary CIP.

Schedule "A" – Community Improvement Project Area Boundary



APPENDIX "A"

RENOVATION GRANT EVALUATION CRITERIA

Criteria	Factor	Score (Points)	Maximum Points
1. Application required on Location Selected Street	For example Year 1 Dunlop Street between Mulcaster Street and High Street		
2.Type of Development	Office and/or residential above grade	10	20
		10	
	At grade commercial	10	
3.Property Description	Vacant Building	10	10
	Partially Vacant Building	5	
4.Conversion Type	Pre-existing vacant space	10	10
	Renovation	5	
5.Employment	More than 8+ jobs	8	20
	Less than * jobs	4	
	High Potential Jobs	8	
6.Residential Units Added	5+	10	10
	2-5	5	
	1	5	
7.Sustainability	<ul style="list-style-type: none"> • LEEDS or equivalent • Energy Saving Measures 		10
8.Design	<ul style="list-style-type: none"> • Materials utilized • Contribution to heritage preservation and character of the area • Accessibility • Landscaping • Signage 		20
			100

APPENDIX B

HOUSING SPECTRUM - LEVEL OF GRANT

Emergency Housing Facilities	Transitional Housing Facilities	Social Housing	Affordable Rental Housing
DC Equivalent Grant			
100% DC Equivalent Grant	75% DC Equivalent Grant	50% of DC Equivalent Grant.	25% of DC Equivalent Grant
Application Fee Grant			
100 % Building Permit Equivalent Fees	75% Building Permit Equivalent fees.	50% Building Permit Equivalent fees.	25% Building Permit Equivalent fees.
Planning Application Fees based on the percentage of Emergency Housing Facilities provided within a redevelopment project.	Planning Application Fees based on the percentage of Transitional Housing facilities provided within a redevelopment project.	Planning Application Fees based on the percentage of Social Housing units provided within a redevelopment project.	Planning Application Fees based on the percentage of Affordable Rental Housing Units provided within a redevelopment project.

Definitions of the Spectrum of Affordable Housing:

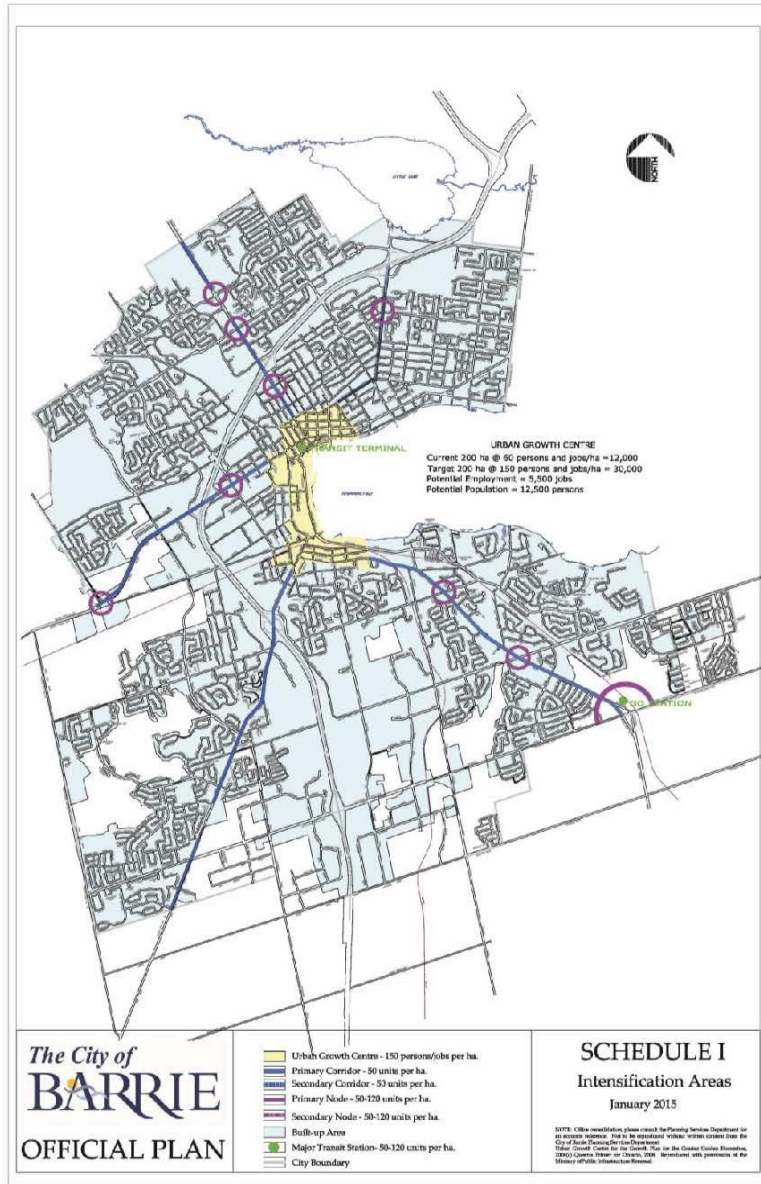
- a) Emergency Housing is housing that provides short term interim housing such as shelters, to address an immediate need to take a person or persons out of a harmful or high risk situation.
- b) Transitional Housing is temporary accommodation to bridges the gap from homelessness to permanent *housing* by offering support services structure, supervision, to facilitate integration into permanent occupation. Support may include education and training, translation services, life skills as appropriate to the situation.
- c) Social Housing may include Not-for-Profit Housing, Rent Geared to Income Housing, Urban Native Housing, or any form of rental housing, where rental costs are supplemented with government subsidy. This may include co-op housing supported by the housing service provider.
- d) Affordable Rental Housing: is as defined in the City of Barrie Official Plan and Provincial Policy Statement which is as follows:

Affordable Rental Housing is defined as the least expensive of:

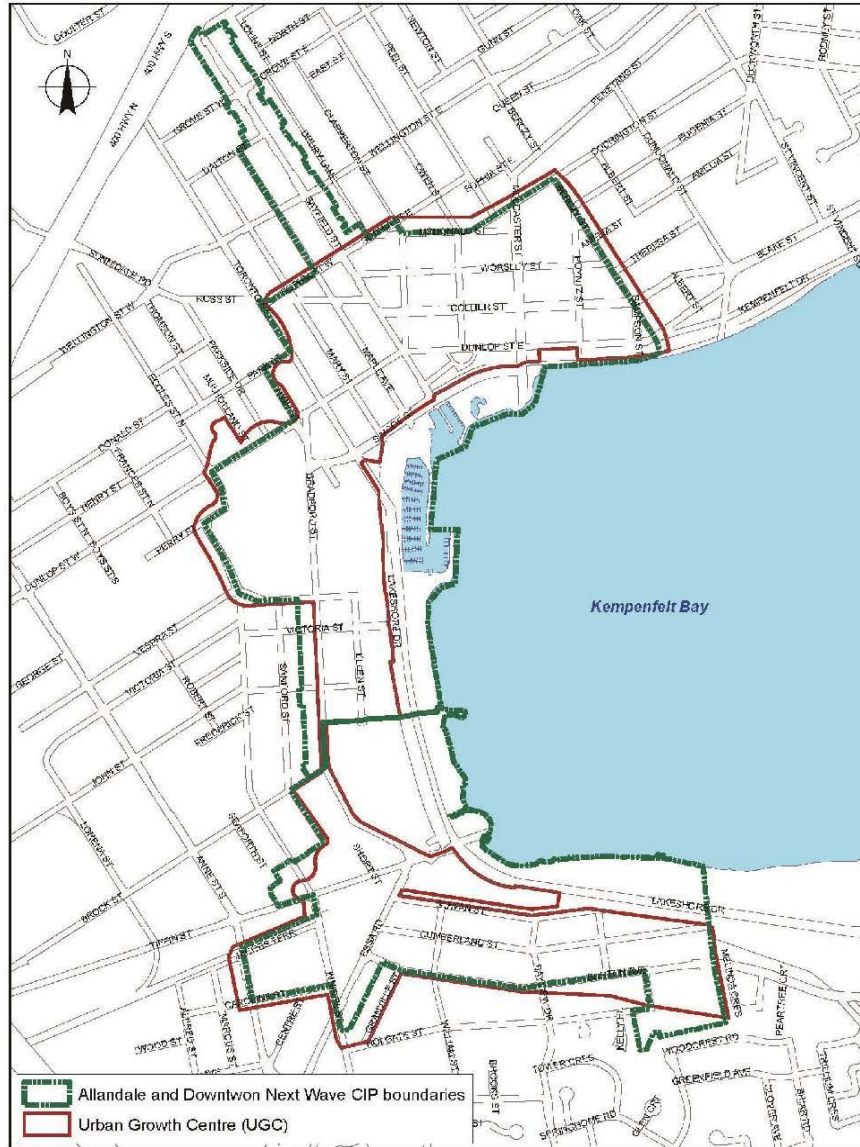
- i. A unit for which the rent does not exceed 30% of the gross annual household income for low and moderate income households; or
- ii. A unit for which the rent is below the average market rent of a unit in the regional market area.

The monthly affordable rental rate and market region may be based on annual price points as determined by the County of Simcoe as the Service Provider, or as otherwise defined by CMHC or other Federal, Provincial or Local Service provider. This will be reviewed on an annual basis and changes included in the Grant Application Form.

APPENDIX "B"
SCHEDULE I – OFFICIAL PLAN



APPENDIX "C"
Comparison of UGC Boundary and Allandale and Downtown CIP's



APPENDIX "D"
Comparison of Proposed Built Boundary CIP and Downtown/Allandale CIPs

PROPOSED BUILT BOUNDARY CIP	DOWNTOWN AND ALLANDALE CIPS
1. General	
Area of Coverage: Urban Growth Centre Built Boundary Intensification Nodes and Corridors	Area of Coverage: Urban Growth Centre
Two Grant Programs Renovation Grant Redevelopment Grant	Several Grant and Loan Programs Façade, Adaptive Re-use and Upgrade to Building Code and Sign and artwork forgivable loans SLED Grant (safe energy efficient lighting) Building Permit Fees Grant Planning Application Fees Grant Tax Increment Based Grant
2. Small Scale Projects	
Renovation Grant: <ul style="list-style-type: none"> • Façade and sign, adaptive re-use, renovation, restoration • Maximum \$25,000 per building • Applies to listed buildings on the Municipal Heritage Register, in the UGC and Built Boundary. 	Forgivable Loans: <ul style="list-style-type: none"> • Façade and Sign, adaptive re-use, upgrade to building code improvements. • Maximum \$25,000 per façade or adaptive reuse project • Maximum \$5,000 for sign or artworks • Some properties listed as Heritage Resources in Allandale are eligible for a renovation loan. Small Grants: <ul style="list-style-type: none"> • 25% Building permit fees • Planning application fees • SLED – Safe Energy Efficient Outdoor Lighting, maximum \$10,000 per fixture
Approval : Renovation Grants Delegated to the Director of Planning Services.	Approval: Forgivable Loans and Small Grants under \$100,000 Delegated to the Director of Planning Services.
3. More Significant Projects	
Redevelopment Grant <ul style="list-style-type: none"> • Affordable Housing • Intensification Area Redevelopment • Brownfield Redevelopment • Affordable Housing and Brownfield applies to Built Boundary and Intensification Areas including UGC Intensification Area Redevelopment applies to Intensification Nodes and Corridors and UGC	Grants for Projects over \$100,000 and at least \$50,000 Assessment Increase <ul style="list-style-type: none"> • Rental Accommodation (regardless of affordability) • Commercial development • Downtown and Allandale CIP areas only (UGC)

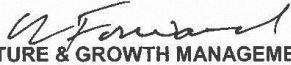
<p>Intensification Area Re/development Commercial component only Costs paid through a Tax Increment Based Grant based on the Schedule below:</p> <ul style="list-style-type: none"> • 50% Development Charges • 50% Building Permit Fees • Planning Application Fees <table border="1" data-bbox="337 625 799 793"> <thead> <tr> <th></th> <th>To applicant</th> <th>To CIP reserve</th> </tr> </thead> <tbody> <tr> <td>Year 1</td> <td>100% pro-rated</td> <td>-</td> </tr> <tr> <td>Year2</td> <td>100 %</td> <td>-</td> </tr> <tr> <td>Year3</td> <td>75%</td> <td>25%</td> </tr> <tr> <td>Year 4</td> <td>50%</td> <td>50%</td> </tr> <tr> <td>Year5</td> <td>25%</td> <td>75%</td> </tr> </tbody> </table>		To applicant	To CIP reserve	Year 1	100% pro-rated	-	Year2	100 %	-	Year3	75%	25%	Year 4	50%	50%	Year5	25%	75%	<p>Commercial Development in Allandale or Downtown CIP area (UGC)</p> <ul style="list-style-type: none"> • Percentage of Planning Building Permit Fees (25% for first \$25,000 and 50% for balance of fees) Separate Grant • Tax Increment Based Grant - separate grant based on the Table below <table border="1" data-bbox="824 625 1286 793"> <thead> <tr> <th></th> <th>To Applicant</th> </tr> </thead> <tbody> <tr> <td>Year 1</td> <td>100% pro-rated</td> </tr> <tr> <td>Year2</td> <td>100 %</td> </tr> <tr> <td>Year3</td> <td>75%</td> </tr> <tr> <td>Year 4</td> <td>50%</td> </tr> <tr> <td>Year5</td> <td>25%</td> </tr> </tbody> </table>		To Applicant	Year 1	100% pro-rated	Year2	100 %	Year3	75%	Year 4	50%	Year5	25%
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Year 4	50%																														
Year5	25%																														
<p>Approval : Redevelopment Grants Delegated to a Redevelopment Grant Review Group comprised of General Manager of Infrastructure and Growth Management, the General Manager of Community and Corporate Services and the Executive Director of Invest Barrie.</p>	<p>Approval: Tax Increment Based Grants, combined with Permit & Application Fees Grants over \$100,000 Decision of Council – A staff report from Planning Services with a recommendation.</p>																														
<p>CIP Grants factor in a percentage of DC equivalent payment for Affordable Housing and Intensification Area Grants</p>	<p>DC costs are not part of the Downtown and Allandale CIPs</p>																														
<p>Where DC Discounts or Exemptions are in place, for example discounts for Commercial Development in the City Centre Planning Area, the grants will be based on the greater of the two.</p>	<p>Any DC discounts or exemptions are part of the DC By-law and are not included in the Downtown or Allandale CIPs</p>																														




Planning Services Department
MEMORANDUM

TO: MAYOR J. LEHMAN AND MEMBERS OF COUNCIL FILE: D18-BUI

FROM: S. NAYLOR, M.E.S., M.C.I.P., R.P.P., DIRECTOR OF PLANNING SERVICES

NOTED: R. FORWARD, MBA, M.Sc., P. ENG. 
GENERAL MANAGER OF INFRASTRUCTURE & GROWTH MANAGEMENT

C. LADD, CHIEF ADMINISTRATIVE OFFICER 

RE: RECOMMENDED CHANGES TO PROPOSED BUILT BOUNDARY COMMUNITY IMPROVEMENT PLAN PLN009-16

DATE: JUNE 6, 2016

Further to a question from the Mayor regarding Staff Report PLN009-16, staff would like to clarify the intent of the definition of Affordable Housing in the Built Boundary Community Improvement Plan attached as Appendix "A" to the Staff Report.

The intention of the definition of "Affordable Housing" is that the least expensive of the two options shall be applied. The proposed definition in Appendix "A" of Staff Report PLN009-16 should therefore read:

1. Affordable Housing **shall be the least expensive of:**
 - i) A unit for which the rent does not exceed 30% of the gross annual household income for low and moderate income households; **or**
 - ii) A unit for which the rent is below the average market rent of a unit in the regional market area.

The proposed revisions will also ensure that the definition of affordable housing in the Community Improvement Plan (CIP) is consistent with the definitions in the City's Official Plan and Affordable Housing Strategy, with the exception that, for the purposes of the CIP, should be below average market rents rather than the same as or below. Staff will make the proposed amendments prior to final Council approval of the CIP on Monday, June 13, 2016.



S. Naylor, M.C.I.P., R.P.P.
Director of Planning Services



TO: MAYOR J. LEHMAN AND MEMBERS OF COUNCIL FILE: D18-BUI

FROM: S. NAYLOR, M.E.S., M.C.I.P., R.P.P., DIRECTOR OF PLANNING SERVICES

NOTED: R. FORWARD, MBA, M.Sc., P. ENG. *R. Forward*
GENERAL MANAGER OF INFRASTRUCTURE & GROWTH MANAGEMENT

C. LADD, CHIEF ADMINISTRATIVE OFFICER *C. Ladd*

RE: PROPOSED BUILT BOUNDARY COMMUNITY IMPROVEMENT PLAN STAFF REPORT PLN009-16

DATE: JUNE 20, 2016

In follow up to General Committee discussions on June 6, 2016 regarding Staff Report PLN009-16 and the proposed Built Boundary Community Improvement Plan, additional information was requested regarding the following matters:

- a) Further clarification regarding the definition of affordable rental housing.
- b) Additional information regarding options to incentivize affordable home ownership through CIP or other incentives.
- c) Affordable Housing Strategy Targets.

Definition of Affordable Rental Housing

The definition of affordable rental units in Section 7.2(c) of the draft CIP attached to Staff Report PLN009-16 is:

- c) Affordable rental housing defined as:
 - i) A unit for which the rent does not exceed 30 percent of the gross annual household income for low and moderate income households.
 - ii) A unit for which the rent is below the average market rent of a unit in the regional market.

The definition for affordable rental housing in the Provincial Policy Statement, the City's Official Plan, and the City's Affordable Housing Strategy varies from this definition and is as follows (differences are bolded and italicized):

In the case of rental housing, *the least expensive of:*

- (1) A unit for which the rent does not exceed 30% of the gross annual household income for low and moderate income households; **or**
- (2) A unit for which the rent is **at or** below the average market rent of a unit in the regional market area.

The memorandum which was provided to General Committee as part of the "additions" package on Monday, June 6, 2016, identified the intent of and potential wording to be added to the CIP definition

to align it more closely with the definitions in the Provincial Policy Statement, the City's Official Plan, and the City's Affordable Housing Policy. The variance in the definition was subtle but critical for the following reasons.

The definition in the CIP as attached to Staff Report PLN009-16 provides two methods of determining affordability; one is based on gross household income and the other is based on average market rents. The CIP definition however does not make it clear which criteria should be applied and the resultant difference could be quite significant. The definitions in the other documents referenced above make it clear that the least expensive of the two criteria will be applied. An amendment to the definition of affordable rental housing in the CIP to reflect the definition in the other three documents would provide clarity to prospective applicants that affordability will be based on the least expensive of the two criteria. An amendment to the definition will be prepared for the meeting on June 20, 2016.

Market Rent or Below Market Rent

The Provincial Policy Statement, the City's Official Plan and the City's Affordable Housing Strategy refer to affordable rental housing as units for which the rent is "at or below" average market rents. Notwithstanding any amendments to the definition described above, the recommendation in Staff Report PLN009-16 identified that to be eligible for incentives under the CIP, units should be below average market rents. Although not specified in the CIP, it is staff's intention to apply approximately 20% below average market rents. This is based on the Ministry's requirement for funding under the AHP or IAH funded programs and formed the basis for the County's original thresholds for their funding programs. This information was communicated through the public consultation process and staff are proposing to include this affordability threshold as part of the application forms for redevelopment grants. The application forms would also include a statement indicating that these thresholds may change from time to time and applicants should consult with the Planning Services Department. This allows Council to change the threshold from time to time based on a variety of factors including uptake, vacancy rates and prioritization without requiring a full scale amendment to the CIP including public meetings, open houses and Ministry consultation. The CIP contains provisions for annual reporting and if affordability thresholds require revisions, staff will address the matter through this annual report. Revised numbers will be posted on the City's website and finally, all applicants will be advised of these thresholds through the site plan pre-consultation well in advance of actually submitting an application for the redevelopment grant.

The rationale in applying "below" market rent in the proposed CIP is that the most effective use of limited public funds would be for rental units that are offered below average market rents in order to address the area of greatest need.

However, the CMHC Rental Housing Report (2015) indicates that the vacancy rate in Barrie dropped from 1.6% to 1.3% from 2014 to 2015. A healthy vacancy rate is 5%. Consequently, there is definitely merit in providing incentives for rental housing at average market rents to incent the creation of new rental housing. However, staff recommended in Staff Report PLN009-16 that incentives be provided only for units below market rents because, as indicated in the Affordable Housing Strategy, rents in Barrie are currently the sixth highest of any municipality in Canada. Staff are of the opinion that incenting new units at this price point will only exacerbate this issue and that the most effective use of public funds is to incent new units in Barrie at lower than the current market rents.

If Council wishes to incent rental units at average market rents, the CIP definition can be amended accordingly.

Incentivizing Affordable Home Ownership

The question of incentivizing affordable home ownership has arisen on a number of occasions through a variety of initiatives that the City is exploring. The issue was raised by Mr. Sean Mason at the time of the public meeting and is addressed in paragraph 33 of Staff Report PLN009-16. It was

also addressed at the time of the public meeting by Merwan Kalyaniwalla, Manager of Policy Planning.

The issue of incentivizing affordable ownership through financial incentives (and in fact through other methods currently being reviewed) is that there is no mechanism to ensure that those units remain at an affordable price point. Unlike rental housing where the City can require that the owner of the unit enter into an agreement to maintain rents at a specific price point, there is no way of ensuring that ownership units, even if originally sold at an affordable price point, will remain that way through the second, third or fourth sale and beyond. Without that surety in place, incentivizing ownership units may simply create a fertile market place for speculators and drive the price of housing higher.

As indicated at the public meeting, staff have already contacted a variety of other municipalities to determine if incentives are offered for ownership models and, as was reported at the public meeting, there are programs in place to provide incentives for home ownership. These incentives are provided by Housing Service providers (in this case the County of Simcoe) and are provided directly to the home purchaser and not to a developer. In this model, the purchaser has to satisfy the service provider of need (based on income), and then enters into an agreement with the Service Provider ensuring that the need continues and that the unit remains affordable. The Service Provider in effect becomes a low interest lending agency. This ensures the incentives are provided to the end user rather than a developer or a speculator.

There are other measures under review as well for incentivising an ownership model for affordable housing. A public meeting will be held on June 20, 2016, to consider proposed official plan policies and reduced zoning standards which are being recommended by the Built Form Working Group to encourage the development of affordable housing including ownership. If approved, it is hoped that these revised standards will reduce overall costs which can be passed on to purchasers or tenants.

The Built Form Task Force is also reviewing potential financial incentives including a reduction in development charges, however the same concern with respect to ensuring the long term affordability remains a challenge in this regard.

Council should also be aware that the Province has tabled Bill 204 which is proposing to allow municipalities to require inclusionary zoning, and also includes recommendations for reduced fees and development charge reductions for certain types of affordable housing, including ownership models. Staff will continue to monitor this legislation, suggest the City provide comments on the draft Bill (if warranted) and will keep Council informed of the status of the Bill and its implications.

With regard to the issue of providing incentives for not-for-profit "sweat equity" service providers such as Habitat for Humanity or other models providing home ownership, Council should be aware that tools already exist under Section 9 of the CIP allowing for the acquisition and disposal of land which would arguably provide the greatest incentive to these organizations. However, if Council determines that financial incentives should also be offered in addition to this existing incentive, the CIP could be amended to provide general wording identifying that incentives are available to not for profit organizations which provide home ownership models and which have processes in place to ensure the maintenance of affordability through subsequent purchases and sales. Detailed criteria for these types of service providers can be included in the revised application forms which will be prepared over the summer of 2016. The language in the CIP, should Council direct staff to amend the document, could read as follows:

The Redevelopment Grant is also available to Not-For-Profit service providers which offer affordable home ownership units and which have processes and/or mechanisms in place to ensure the continued affordability of the unit for a specified period of time. The provisions of the Redevelopment Grant for this form of affordable housing would be the same as the provisions for Affordable Rental housing.

Affordable Housing Strategy Targets

The City's Affordable Housing Strategy identifies 10 year housing target as follows:

Location	Units affordable to persons making...				Rent-Geared to Income	Affordable Homeownership Dwellings <\$30,000 per year	Total Affordable Dwellings required
	<\$642 per mth	\$643 - \$1,149 per mth	\$1,150 - \$1541 per mth	\$1,542 - \$2,596 per mth			
City of Barrie	200	123	171	47	252	47	840
Simcoe County	518	341	649	174	805	198	2,685

These targets align with the County of Simcoe's 10 Year Affordable Housing and Homelessness Prevention Strategy.

The proposed CIP will support and facilitate the City's ability to meet its affordable housing targets.



S. Naylor, M.C.I.P., R.P.P.
Director of Planning Services

Staff Report



STAFF REPORT PLN016-16
September 26, 2016

Page: 1
File: D18-BUI
Pending #:
P35/15

TO: GENERAL COMMITTEE

SUBJECT: PROPOSED BUILT BOUNDARY COMMUNITY IMPROVEMENT PLAN
REVIEW OF STAFF REPORT PLN009-16

WARD: ALL

PREPARED BY AND KEY CONTACT: K. BRISLIN B.Sc., M.C.I.P., R.P.P., SENIOR POLICY PLANNER
EXTENSION # 4440

SUBMITTED BY: S. NAYLOR, MES, M.C.I.P., R.P.P., DIRECTOR OF PLANNING AND
BUILDING SERVICES

GENERAL MANAGER APPROVAL: R. FORWARD, MBA, M.Sc., P. ENG.
GENERAL MANAGER OF INFRASTRUCTURE AND GROWTH
MANAGEMENT

CHIEF ADMINISTRATIVE OFFICER APPROVAL: C. LADD, CHIEF ADMINISTRATIVE OFFICER

RECOMMENDED MOTION

1. That a new Community Improvement Plan (CIP), known as the Built Boundary Community Improvement Plan, be approved as outlined in Appendix "A" to Staff Report PLN016-16.
2. That Schedule "A" of By-law 2016-001 illustrating the Built Boundary Community Improvement Project Area be deleted and replaced with Schedule "A" attached to the Built Boundary Community Improvement Plan in Appendix "A" to Staff Report PLN016-16.
3. That the additional taxes realized through increased tax assessment relating to CIP projects, that are not paid to the applicant, as outlined in sections 7.4.1 5.b); 7.4.2 2.d) and 7.4.3 1.b) in the attached Built Boundary CIP, be transferred to the CIP Reserve to fund future CIP Projects.

PURPOSE & BACKGROUND

Purpose

4. The purpose of this Staff Report is to recommend approval of a revised Built Boundary Community Improvement Plan.

Background

5. Staff Report PLN009-16, dated June 6, recommended a Community Improvement Plan referred to as the Built Boundary Community Improvement Plan which proposes financial incentive programs to support the renovation of existing heritage buildings and buildings within the urban growth centre, and the development of affordable housing, brownfield redevelopment and mixed-use development in the intensification areas which include the Urban Growth Centre, and Intensification Nodes and Corridors and Major Transit areas identified on Schedule I to the Official Plan.

6. The report was referred back to staff to address the following matters:
 - a) Review of a consistent definition of affordable housing.
 - b) Review options available and the implications associated with providing incentives for all rental development.
 - c) Provide opportunities to incent affordable home ownership, specifically for not-for-profit and or charitable service providers offering a sweat-equity type of ownership model, to be assisted at the same level as social housing (50%) up to five units per year.
 - d) Direction was also provided to include transition provisions or allow for retro-activity to apply to incentives for affordable ownership sweat-equity models for eligible projects initiated prior to approval of the CIP.
7. In addition to the foregoing, questions raised included clarification with respect to the effects of bonusing on proposed incentives, and the implications of proposed new provincial legislation known as Bill 204 – the Promoting Affordable Housing Act, 2016.
8. These items have been addressed in the proposed CIP and are outlined in this report.

Definition of Affordable Housing:

9. The definition of affordable rental units in Section 7.2(c) of the draft CIP attached to Staff Report PLN009-16 is based on the definition for affordable rental housing in the Provincial Policy Statement, the City's Official Plan, and the City's Affordable Housing Strategy with one exception.

In the case of rental housing, the least expensive of:
 - a) A unit for which the rent does not exceed 30% of the gross annual household income for low and moderate income households; or
 - b) A unit for which the rent is below the average market rent of a unit in the regional market area.
10. The Provincial Policy Statement, Official Plan, and Affordable Housing Strategy definition of affordability is for units for which the rent is "at or below" the average market rent.
11. The County of Simcoe uses the median household income which is \$76,209 for the Barrie area.
12. The 2015-2016 City of Barrie Affordable Housing Annual Report dated June 2016, provided information on Average Market Rents, and rents based on the median income in Barrie as follows:

Apartments (Rent per Month)	Bachelor	1 Bedroom	2 Bedroom	3 Bedroom	30% of adjusted median annual gross household income
	\$728	\$1,006	\$1,167	\$1,299	\$1,905

Source: CMHC Rental Housing Market Report Fall 2015

ANALYSIS

Proposed Definition:

13. Staff recommend, in keeping with the Provincial Policy Statement(PPS), Official Plan (OP) and Affordable Housing Strategy the following definition:

Affordable rental housing shall be the least expensive of:

- a) a unit for which the rent does not exceed 30% of gross annual household income for low and moderate income households; or
- b) a unit for which the rent is at or below the average market rent of a unit in the regional market area.

Options for Incentivizing Market Rental

- 14. Rents in Barrie are currently the sixth highest of any municipality in Canada and the CMHC Rental Housing Report (Fall 2015) indicates that the vacancy rate in Barrie dropped from 1.6% to 1.3% between 2014 to 2015. A 5% vacancy rate is considered healthy. Thus there is merit to providing incentives to support provision of market rental housing.
- 15. Consequently staff have amended the definition of Affordable Housing in the CIP to be consistent with the definition in the PPS, the City OP, and the Affordable Housing Strategy.
- 16. In addition, staff have included a Tax Increment based grant for affordable units at or below average market per the affordable housing definition such that a tax increment based payment will be granted over a five year period based on the percentage of affordable units provided within the entire project. This would apply to all affordable units, except where properties are exempt from taxes, in which case the tax increment grant would not apply.
- 17. Staff have included these changes in the proposed Built Boundary CIP attached as Appendix A to this staff Report PLN016-16.
- 18. In addition, the City currently offers tax based support to encourage rental residential through establishing equity with the Residential Class Tax Rate and Multi Residential Tax Rate. Over the past several years the City has progressively reduced the tax ratio for multi-residential units by approximately 25% annually to bring it to equity with residential. This is a significant tax-based support to encourage rental residential throughout the municipality, which is not part of the CIP. In 2009, the multi residential tax rate was 1.2 compared with 1.11 for residential units. The current rate for multi residential and residential is equal at 1.15.

Incentivizing Affordable Home Ownership

- 19. The attached CIP has been amended to provide grants for not-for-profit and charitable organizations which provide home ownership models, including sweat equity models, and which have processes in place to ensure the maintenance of affordability through subsequent purchases and sales. The CIP has included retroactivity clauses for this type of affordable ownership for any applications submitted as of January 1, 2016. The proposed tax increment based grant would also apply to these ownership units, whereby the benefits would be directly passed on to the owners.

20. The question of incentivizing affordable home ownership for anything over and above sweat equity type models is not recommended for reasons outlined in staff Report PLN009-16, and a Memorandum to Council dated June 6, 2016.
21. As stated in the memorandum to Council dated June 6, 2016, *“unlike rental housing where the City can require that the owner of the rental project enter into an agreement to maintain rents at a specific price point, there is no way of ensuring that ownership units, even if originally sold at an affordable price point, will remain that way through the second, third or fourth sale and beyond. Without that surety in place, incentivizing ownership units may simply create a fertile market place for speculators and drive the price of housing higher”*. The exception is in the case of ownership units developed by not-for profit or charitable organizations such as Habitat for Humanity where qualifying owners are required to enter into an agreement with the organization which can be tied to title through financing arrangements.”
22. Also as stated in the memorandum to Council dated June 6, 2016, *“Staff contacted and reviewed a variety of municipalities to determine if incentives are offered for ownership models. Programs in place for ownership in Ontario are provided by Housing Service providers (in this case the County of Simcoe) provide assistance directly to the home purchaser. In this model, the purchaser is required to satisfy the service provider of need (based on income), and then enters into an agreement with the Service Provider ensuring that the need continues and that the unit remains affordable. The Service Provider in effect becomes a low interest lending agency. This ensures the incentives are provided to the end user rather than a developer or a speculator.”* The County of Simcoe as the service provider does have similar programs which would apply to ownership within the City of Barrie.”
23. A public meeting was held on June 20, 2016, to consider proposed official plan policies and reduced zoning standards which are being recommended by the Built Form Task Force Working Group to encourage the development of affordable housing including ownership. The recommendations following this public meeting will be included in a Staff Report to be submitted in the Fall of 2016. The presumption is that revised standards will reduce overall costs which can be passed on to purchasers or tenants.
24. The Built Form Task Force Working Group also reviewed potential financial incentives including alignment of development charges for ownership and rental units. The same concern with respect to ensuring the long term affordability remains a challenge in this regard. Staff will be reporting back to General Committee on this matter.

Bonusing and the Proposed CIP

25. Bonusing refers to community benefits negotiated with a developer if Council approves an application to increase height and/or density which may include the provision of affordable housing.
26. In the case where a development provides affordable housing as a community benefit and Council approves an application for increased density or height, then this affordable housing will not be eligible for incentives under this proposed CIP. However, where a development includes affordable housing beyond the negotiated community benefit, subject to meeting all other eligibility requirements of the CIP, the additional affordable housing provisions may be eligible for the financial incentives being offered through the CIP.

Bill 204 - Proposed Legislation for Inclusionary Zoning

27. Bill 204 – the Promoting Affordable Housing Act, 2016 was recently introduced as part of the Province's Long-Term Affordable Housing Strategy commitment to facilitating a greater range of housing choices and increasing the supply of affordable housing. Bill 204 proposes to allow municipalities to require inclusionary zoning, and also includes recommendations for reduced fees and development charge reductions for certain types of affordable housing, including ownership models. This Bill also proposes that affordability be registered on title for a time period.
28. Bill 204 may have significant implications for the proposed CIP. For example, if Inclusionary zoning is proposed and a set amount of affordable housing is required to be developed, then the City may only wish to provide incentives for affordable housing offered over and above those required through inclusionary zoning.
29. Staff will continue to monitor the status of this legislation and if necessary will recommend amendments to the Built Boundary CIP to align with the legislation if and when it is approved.

Further Stakeholder Input

30. Further discussions with stakeholders who have expressed an interest in the proposed Built Boundary CIP have occurred since Council's consideration of Staff Report PLN009-16 in June 2016. The two issues relate to offering a tax increment based grant for rental residential in the intensification areas and the 20 year time frame for maintaining affordability. A summary of these discussions are noted in Appendix "E" attached.
31. The attached proposed Built Boundary CIP as revised includes a Tax Increment Based Grant for at or below average market rents.
32. Based on stakeholder input, staff recommend changing from 20 years to 10 years to maintain rental affordability.
33. The County of Simcoe has reduced the period for maintaining affordability to 10 years for projects which do not include provincial and federal funding, while maintaining 20 years for projects which do. In review of the comments and based on recent actions from the County, staff are of the opinion that a 20 year commitment to maintain affordability is too long, as market conditions and changes may occur in this time. Staff have revised the time frame to 10 years, in the proposed Built Boundary CIP attached as Appendix "A" to this report.

ENVIRONMENTAL MATTERS

34. The Redevelopment Grant program for brownfield costs will facilitate clean up and redevelopment of vacant contaminated sites and support soil and water quality improvement.
35. The proposed evaluation criteria include the opportunity to add scoring points for Leadership in Energy and Environmental Design (LEED) or equivalent design and development attributes.

ALTERNATIVES

36. There are two alternatives available for consideration by General Committee:

Alternative #1 General Committee could provide grants based on different percentages. Although this is viable, staff recommend grant percentages as proposed, as generally they have been developed in accordance with the Built Form Task Force, and other feedback.

Alternative #2 General Committee could set the affordable grant rate higher than “at or below average market rental for the region”. Although this is viable, staff recommend that this be reviewed after the proposed Built Boundary CIP programs have been monitored for two years in order to assess the uptake of the program and its impact on rental supply and vacancy rates.

FINANCIAL

37. The overall discussion on the financial implications was outlined in Staff Report PLN009-16, the extract of this section of the Staff Report PLN009-16 provided in Appendix “F” attached. The financial incentives for all programs are outlined in the Table below and include the recommended changes to the CIP as a result of this review.

Affordable Housing Spectrum						Intensificati on Nodes/ Corridors/ UGC - Mixed Use	Brownfield Site ²
Emergency Shelter Housing	Transitional Housing	Social Housing	Affordable Rental – Average Market Rental or Less ¹	Affordable Home Ownership Not-for- Profit Sweat Equity			
100% of DC Equivalent Grant	75% of DC Equivalent Grant	50% of DC Equivalent Grant	25% of DC Equivalent Grant	50% of DC Equivalent Grant	50% of DC Equivalent Grant	Studies Grant	
100% Building Permit Equivalent Fees	75% Building Permit Equivalent fees	50% Building Permit Equivalent fees	25% Building Permit Equivalent fees	50% Building Permit Equivalent fees	50% Building Permit Equivalent fees	Remediation Grant	
100% Planning Fee	75% Planning Fee	50% Planning Fee	25% Planning Fee	50% Planning Fee	100% Planning Fee		
Tax Increment Grant ² 5yrs	Tax Increment Grant ² 5yrs	Tax Increment Grant ² 5yrs	Tax Increment Grant ² 5yrs	Tax Increment Grant ² 5yrs	Tax Increment Grant ² 5yrs		
Grants available at Building Permit	Grants available at Building Permit	Grants paid at 50% Occupancy	Grants paid at 50% Occupancy	Grants available at Building Permit	Grant paid after tax increment is determined through MPAC property assessment ⁴	Grant paid after tax increment is determined through MPAC property assessment ³	
1. Affordable rental housing is as defined as the least expensive of: i) A unit for which the rent does not exceed 30% of the gross annual household income for low and moderate income households; or ii) A unit for which the rent is at or below the average market rent of a unit in the regional market area. 2. Projects that are exempt from taxes would not qualify for the Tax Increment Grant. 3. Grant provided for the lesser of the total cost of remediation or the value of tax incremental increase payment over the five year period. 4. The grant only applies to the commercial component of the mixed use development.							

38. The implications of the changes included in the proposed CIP which are: opening up the incentives to units at average market rentals; providing incentives for affordable ownership provided by not-for- profit or charitable organizations, and adding a Tax Increment Grant for the Spectrum of Affordable Housing categories are outlined below.

39. Assuming 50 two bedroom affordable rental units are developed in 2017 (Five 100 unit developments providing 10% of units as affordable rental), a budget allocation of approximately \$350,300 for this program would be required (This represents an average grant of \$7,006 per affordable unit). Payment would occur at 50% occupancy. In addition, a tax increment grant would apply for eligible rental units, paid after the property is re-assessed and increased taxes are charged.
40. Based on the proposed grant for not-for-profit charitable sweat equity type models, the City of Barrie has issued three permits for Habitat for Humanity units that would be eligible under the recommended changes. The funding requirement based on the proposed grant at the 50% level would be \$49,563 (This represents Development Charges of \$31,495 per unit, and Building Permit Fees of \$1,547 per unit). In this instance, planning application fees did not apply as all the approvals were in place. In addition, a tax increment grant will be paid out after the increased taxes are billed.
41. If a full five units were to be developed in 2017, the budgetary requirement would be estimated at \$95,000, assuming the same rate of (\$31,495 X 50%) \$16,512 per unit for DC's and building permit fees, and \$2,500 per unit for planning application fees. In addition, the tax increment grant would apply after the properties are re-assessed. Staff recommend that this grant be capped at five units per year part until such time as the CIP Reserve is built up.
42. Staff anticipate approximately \$350,000 will be available in uncommitted reserve funds in the CIP account by the end of 2016. The 2016 "sweat equity" affordable ownership units could be funded through these funds and the balance carried over for funding of the other programs under the proposed built boundary CIP.
43. Staff will be submitting budgetary expectations for CIPs for 2017 based on ongoing applications under consideration under the Downtown and Allandale CIP programs and anticipated applications under the proposed new Built Boundary CIP should this be approved.
44. The budget will include an amount for the renovation grant program and some initial funding for the affordable housing grants under the redevelopment program where seeder funding will be necessary until such time as funds have been built up in the CIP reserve through the tax revenue from incremental tax grant. This will also take into account any uncommitted funds that are currently in the CIP reserve account, and ongoing applications submitted under the Downtown and Allandale CIP's.

LINKAGE TO 2014-2018 STRATEGIC PLAN

45. The recommendations included in this Staff Report support the following goals identified in the 2014-2018 Strategic Plan:
 - Responsible Spending
 - Inclusive Community
46. The expenditure of public funds to target outcomes and achieve growth management and planning and development objectives that may otherwise be difficult to achieve given barriers to development in the built boundary.
47. Incentives are proposed at different levels to encourage a spectrum of affordable housing types which supports an inclusive community.

Attachments:

- Appendix "A" - Built Boundary – Community Improvement Project Area
- Appendix "B" - Schedule I to the Official Plan
- Appendix "C" - Comparison of UGC Boundary and Allandale and Downtown CIPs
- Appendix "D" - Comparison of Proposed Built Boundary CIP and Downtown/Allandale CIPs
- Appendix "E" - Summary of further Public Input
- Appendix "F" – Extract Financial Section Staff Report PLN009-16

APPENDIX "A"
BUILT BOUNDARY – COMMUNITY IMPROVEMENT PLAN

PART A: PREAMBLE

1.0 Background

The Provincial Growth Plan identifies Downtown Barrie as an Urban Growth Centre (UGC). Intensified mixed use development including residential, office, commercial and institutional uses are contemplated at densities of 150 persons and jobs per hectare in the UGC. The Growth Plan also sets population targets and requires at least 40% of new growth to be accommodated within the built up area.

In 2009, the City prepared an Intensification Study which identified key intensification areas including the UGC, mixed use nodes and corridors along major arterial roads, intersections and areas within walking distance of transit stations. Urban Design Guidelines were prepared in 2013 for these key intensification areas to provide guidance for development of private and public realm lands in these areas. Two new zone categories for the Intensification Nodes and Corridors have also been approved by Council to implement the type of development envisaged for these areas.

In addition, Council approved an Affordable Housing Strategy in February 2015 which included direction to develop incentives for the provision of affordable housing.

Finally, in 2010 Council approved a Brownfield strategy which included a recommendation to develop financial incentives to facilitate the rehabilitation of potential brownfield sites within the City.

The purpose of this Community Improvement Plan (CIP) is to facilitate the development of more affordable housing units; to encourage the clean-up and development of brownfield sites; and to encourage development of mixed use nodes and corridors, and other intensification areas within the City's Built Boundary as designated on Schedule I of the Official Plan.

2.0 Basis

The City of Barrie Official Plan currently contains provisions regarding Community Improvement Planning which provides that any area within the City of Barrie (exclusive of the lands annexed into the City in 2010) may be designated a Community Improvement Project Area pursuant to Section 28 of the Planning Act.

In addition, Section 3.6.2.4 of the Official Plan states that Community Improvement Plans may provide direction, guidelines and a strategy for a number of matters, not limited to:

1. Allocation of public funds such as grants, loans, tax assistance or other financial instruments for the physical rehabilitation, redevelopment or improvement of land and buildings, to registered owners, assessed owners, tenants and assignees of lands or buildings.
2. Municipal acquisition or holding of land or buildings and subsequent clearance, grading, rehabilitation, redevelopment or resale of these properties or other preparation of land or buildings for community improvement.
3. Public/Private Partnerships, joint ventures and cost-sharing arrangements.
4. To achieve a variety of planning, development, growth management, transportation and health and safety and community objectives.

This Community Improvement Plan arises from several converging considerations which are summarised as follows:

1. The need to assess the current Downtown, Allandale and Georgian College CIP's, in light of the fact that they were developed prior to the Places to Grow Provincial Growth Plan (henceforth Growth Plan) came into effect.
2. Council direction for staff to explore opportunities for a sustainable source of funding of the CIP financial incentives (Motion 10-G-257).
3. Development of incentives for brownfield redevelopment as part of a Brownfield Strategy.
4. Review of incentives for Affordable Housing as recommended in both the Affordable Housing Strategy and the Built Form Task Force Report.
5. Investigation into potential incentives for Intensification Nodes and Corridors, to mitigate the cost of development, subject to zoning approval of zoning for mixed use nodes and corridors. (Incentives PLN002-15)(15-G-022)(Mixed Use Zoning PLN018-14)

3.0 Authority - Section 28 of the Planning Act

Authority for the provision of financial incentives is provided by Section 106 of the Municipal Act RSO 2001 and Sections 28(6) and (7) of the Planning Act.

Section 28(1) of the Planning Act defines a "community improvement project area" as "an area within a municipality, the community improvement of which in the opinion of the council is desirable because of age, dilapidation, overcrowding, faulty arrangement, unsuitability of buildings or for any other environmental, social or community economic development reason".

Schedule "A" attached of this Plan constitutes the Community Improvement Project Area which was designated by By-law 2016-001 on January 11, 2016.

For the purposes of developing and implementing a CIP, a municipality may engage in the following activities within the Community Improvement Project area:

1. acquire, hold, clear, grade or otherwise prepare land for community improvement;
2. construct, repair, rehabilitate or improve buildings on land acquired or held by it in conformity with the CIP;
3. sell, lease, or otherwise dispose of any land and buildings acquired or held by it in conformity with the CIP and;
4. make grants or loans to the registered owners, assessed owners, and tenants of lands and buildings to pay for the whole or any part of the cost of rehabilitating such lands and buildings in conformity with the CIP.

PART B: THE COMMUNITY IMPROVEMENT PLAN

1.0 Purpose

The purpose of this Community Improvement Plan will be to provide for Financial Incentives designed to achieve emerging community goals and priorities which target key planning and growth management objectives for development within the Built Boundary, including: affordable housing, brownfield redevelopment, and mixed-use development within the intensification areas identified on Schedule I of the Official Plan.

2.0 Community Improvement Project Area

The Community Improvement Project Area includes all of the Built Boundary as identified on Schedule I of the Official Plan. The Built Boundary Community Improvement Project Area is shown on Schedule "A" of this CIP.

3.0 Objectives

The objectives of this plan are as follows:

1. To support the provision of a variety of affordable housing by offering different levels of support for a continuum of affordable housing options.
2. To facilitate the redevelopment and remediation of brownfield sites.
3. To reinforce the vision for development of the Intensification areas with more intensive mixed use development, by offering incentives to support the development of street level commercial uses in the Intensification areas.
4. To facilitate renovation restoration and adaptive reuse of existing buildings in the Urban Growth Centre and buildings included on the Municipal Heritage Register.

4.0 Community Improvement Financial Incentives

In order to assist the City in achieving these objectives, this CIP will provide incentives in the form of two major programs; a renovation grant program and a redevelopment grant program.

The **Renovation Grant Program** is intended to provide financial incentives to promote the renovation and restoration of existing buildings within the Urban Growth Centre and buildings listed on the Municipal Heritage Register.

The **Redevelopment Grant Program** will provide financial incentives for development/ redevelopment projects which provide affordable housing; remediate and redevelop brownfield sites within the Built Boundary, and develop ground related commercial in combination with the appropriate density and built form to support transit, walkability and animated streets in the intensification areas identified on Schedule I on the Official Plan.

5.0 General Eligibility Requirements for Incentive Grant Programs

1. The property must be within the Built Boundary Community Improvement Project Area, the Urban Growth Centre, an Intensification Node or Corridor as identified on Schedule "A" to this CIP.

2. All applications for assistance will be considered subject to the availability of funding.
3. Any owner of a property, within the Built Boundary Community Improvement Project Area, may apply for assistance, unless stated otherwise in the Specific Eligibility Criteria for grants and loans.
4. An owner or tenant of a residential condominium unit or condominium development shall not be eligible for any of the grants or loans available under this CIP unless otherwise stated in the program details.
5. Improvements shall be made to buildings or land in accordance with the purpose and the objectives of this CIP, the Official Plan, the Zoning By-Law and other municipal By-laws in effect.
6. Expansion, enlargement or improvements of existing legal non-conforming uses shall not be eligible. However, where improvements are proposed to bring uses into closer conformity with the intent of the Official Plan and Zoning By-Law, or Building Code, such improvements may be considered for a grant or loan under this CIP.
7. The property under consideration shall not be in a position of property tax arrears, or shall have a payment schedule acceptable to the City Treasurer at the time of application.
8. The total of the grants and loans made in respect to particular lands and buildings shall not exceed the eligible cost of the improvements with respect to those lands and buildings.
9. Improvements to auto related uses including drive through facilities, auto repair shops, car detailing, car dealerships, sales and leasing of automobiles, gas stations or any other auto related uses shall not be eligible for any grant or loan available under this CIP.
10. Temporary uses, such as temporary sales offices; scaffolding or other non-permanent structures, such as tents; temporary storage areas; temporary parking lots, or properties zoned under temporary use provisions of Section 39 the Planning Act shall not be eligible.

6.0 Renovation Grant Program

6.1 Purpose of the Renovation Grant

The purpose of this grant is to assist in the improvement, restoration or adaptive re-use of existing buildings within the Urban Growth Centre and to assist with restoration and renovation of heritage characteristics of buildings listed on the Municipal Heritage Register.

6.2 Specific Eligibility Requirements of the Renovation Grant

The renovation grant is available to property owners that meet the following eligibility requirements:

1. Buildings within the Urban Growth Centre identified on Schedule "A" attached to this CIP.
2. Buildings within the Built Boundary listed on the Municipal Heritage Register as updated from time to time.
3. Eligible renovations include interior and exterior renovations or improvements such as:

- a) Adaptive re-use, upgrade to building code, accessibility and HVAC improvements and façade and sign improvements.
- b) Restoration and renovation of the interior or exterior of buildings listed on the Municipal Heritage Register.
- c) Improvements that result in increased energy efficiency of buildings.

6.3 Calculation and Timing of Payment of the Renovation Grant

1. Where an application is approved under this program, assistance will be in the form of a grant for 50% of the eligible renovation costs to a maximum of \$25,000 per property, whichever is the lesser.
2. Approval will be conditional upon the works being completed within a year of approval. If works are not completed within the specified time frame, approval will be withdrawn unless the applicant has requested and received written approval for the extension from the Director of Planning and Building Services.
3. A Renovation Grant Agreement between the City and the owner shall be executed and registered on title prior to release of funds for the grant.
4. Grants will be paid at the time of completion of the works and after at least 50% occupancy of the building is confirmed.
5. From time to time, the upset maximum for the renovation program may be changed through a resolution of Council, based on monitoring of uptake, without requiring an amendment to this plan.

6.4 Renovation Grant Program Delivery and Process

1. Approval of the Renovation Grant is delegated to the Director of Planning and Building Services.
2. Applications for grants under this program will be required to be submitted within a prescribed time frame for consideration.
3. Only complete applications will be considered.
4. Eligibility criteria, evaluation criteria and if applicable priority streets will be stipulated on an annual basis.
5. Evaluation criteria shall be applied to assist in selection and approval of eligible projects and shall take into account the following considerations:
 - a) The proposed improvements result in increased occupancy of existing building within the UGC. Rankings will be based on the provision of ground floor commercial uses with second and third story residential and/or employment uses.
 - b) The proposed improvements result in the renovation/restoration of existing building on the municipal heritage registry.
 - c) The improvements result in a net increase to the employment and residential base of the Urban Growth Centre.

- d) The improvements result in a net increase to the availability of office and residential space on upper floors.
- 6. Evaluation criteria and scoring of grant applications may be amended on an annual basis.
- 7. Following the closing date the list of applications and details of the proposals will be made available to the Director of Planning and Building Services who shall evaluate applications against the criteria referenced above.
- 8. More than one intake per year may be considered at the discretion of the Director of Planning and Building Services subject to uptake and funding availability in any one year.

7.0 Redevelopment Grant Program

7.1 Purpose of the Redevelopment Grant Program

The purpose of the Redevelopment Grant Program is to provide financial incentives for (re)development which entails any of the following:

- 1. The provision of a variety of affordable housing.
- 2. The development of the Intensification Areas in with the density, mix of uses and built form required in accordance with the Official Plan and Zoning By-law. The intent is to support development that is in accordance with the vision of the intensification areas which includes mid-rise mixed use developments with animated complete streets as articulated in the Intensification Area Urban Design Guidelines dated April 2012. In some cases this may require zoning changes to meet the recommendations of the Intensification Area Urban Design Guidelines.
- 3. To support the redevelopment of Brownfield sites within the built boundary.

7.2 Specific Eligibility Requirements of the Redevelopment Grant

- 1. Affordable Housing:
 - a) A development or redevelopment which provides affordable housing within the Built Boundary or within the Urban Growth Centre, an Intensification Node or Corridor outside of the Built Boundary as identified on Schedule A of this CIP.
 - b) Those units within a development or redevelopment that meet the Affordable Rental Housing definition will only be eligible for the grant.
 - c) Affordable rental housing defined as the least expensive of:
 - i) A unit for which the rent does not exceed 30% of the gross annual household income for low and moderate income households; or
 - ii) A unit for which the rent is at or below the average market rent of a unit in the regional market area.
 - d) Affordable home ownership offered by Not-For-Profit service providers and/or charitable service providers offering a sweat-equity type of ownership model which offer affordable home ownership units and which have processes and/or

mechanisms in place to ensure the continued affordability of the unit for a specified period of time.

2. Intensification Area Redevelopment:
 - a) Properties or a consolidated group of properties or buildings with a minimum of 100m frontage on a road forming an Intensification Corridor or on one of the intersections forming an Intensification Node, within the Community Improvement Project Area Map - Schedule "A".
 - b) Properties or buildings within or partially within the Urban Growth Centre.
 - c) Properties or buildings within 500m of a Transit Station.
 - d) Projects shall comply with applicable official plan policies including densities and density and zoning requirements.
 - e) Properties within the Mixed Use Nodes and Corridors shall be required to comply with the City's Mixed Use Nodes and Mixed Use Corridor zoning standards. In addition the applicable Intensification Area Urban Design Guidelines shall be included in the design. Development within the Urban Growth Centre shall also comply with the mixed use more intensive development as articulated in the latest approved Intensification Area Urban Design Guidelines.
 - f) This grant shall only be provided where the full amount of commercial is developed as required in the zoning by-law. In the case of Intensification Corridors, at least 50% of the ground floor shall be developed for commercial use to qualify for the grant. A lesser percentage of ground related commercial will not be eligible.
 - g) The commercial use shall be provided in combination with residential development and shall meet the applicable density requirements; single story commercial development shall not be eligible for this grant program.
 - h) The development shall be in accordance with the vision for the intensification areas and built form as set out in the latest Intensification Area Urban Design Guidelines. In cases where the development complies with the zoning but does not, in the opinion of staff, reflect the Intensification Area Urban Design Guidelines, the property shall not be eligible for the intensification area incentives.
3. Brownfield Redevelopment:
 - a) Redevelopment of brownfields within the Built Boundary, or is within an Intensification Node or Corridor outside the Built Boundary as identified on Schedule "A" attached to this CIP.
 - b) For purposes of this CIP, a brownfield site is a property or part of a property with or without buildings having a history of either industrial or commercial uses and which as a result of these uses has become environmentally contaminated and remediation is needed in order to develop the site for a sensitive use.

7.3 Calculation and Timing of Payment of the Redevelopment Grant

7.3.1 Affordable Housing:

1. Affordable housing grants include a Tax Increment Grant and Affordable Housing charges and fees grant.
2. The value of the Affordable housing charges and fees grants will vary based on the type of affordable housing being considered: Emergency Housing, Transitional Housing, Social Housing, Affordable Rental Housing, and Affordable Not-for-Profit Charitable home ownership models. Refer to Appendix "B" to this CIP for definitions of these types of affordable housing.
3. The grants are for the equivalent costs of a percentage of the applicable Development Charges (DC's) as well as a percentage of Building Permit and Planning Application Fees. The value of the grants for different types of affordable housing is outlined as follows:
 - a) Emergency housing: a payment equalling 100% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of emergency housing units developed within the project.
 - b) Transitional housing: a payment equalling 75% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of transitional units developed within the project.
 - c) Social housing: a payment equalling 50% of development charges and building permit fees applicable to affordable units, and planning application fees based on the percentage of social housing units developed within the project.
 - d) Rental housing: a payment equalling 25% of development charges and building permit fees applicable to affordable units, and planning fees based on the percentage of affordable rental housing units developed within the project.
 - e) Affordable home ownership offered by Not-for-Profit service providers and or charitable service providers offering a sweat-equity type of ownership model which offer affordable home ownership units and which have processes and/or mechanisms in place to ensure the continued affordability of the unit for a specified period of time. The provisions of the Redevelopment Grant for this form of affordable housing would be the same as the provisions for Social Housing noted in 7.3.1. 2 c) above (50%).
3. For purposes of determining the applicable equivalent grant costs the following shall apply:
 - a) Development Charges Equivalent grants are based on the applicable percentage of the Development Charges required in accordance with the Development Charges by-law in effect at the time.
 - b) Building Permit Fees Equivalent grants are based on the full building permit fee required at the time of building permit application. The building permit fees

equivalent grant shall not include conditional building permit fees, unless this fee is approved by the Grant Review Group.

- c) Planning Application Fees Equivalent grants include all application fees applicable to planning processes, including:
 - i) Pre-consultation request forms; application fees for site plan, rezoning, official plan amendments, severance, minor variance, or other planning application process, relevant to the type of affordable housing being proposed on a specific site.
 - d) Planning Application Fees Equivalent grants shall not include security deposits, or letters of credit normally required through the planning process.
4. The Tax Increment Grant is for the incremental tax increase paid back over a five year period for Emergency Housing, Transitional Housing, Social Housing, Affordable Rental Housing at or below average market rents, and Affordable Not-for-Profit Charitable Sweat Equity home ownership. Except where these properties are exempt from taxes.

7.3.2 Intensification Area Redevelopment:

1. Intensification Area redevelopment grants include a Tax Increment Grant and a Charges or Fees Grant for the Commercial component of development in intensification nodes, corridors or the urban growth centre.
2. The following charges or fees for the commercial component will be granted:
 - a) 50% of Development Charges for the ground related commercial component of the project.
 - b) 50% of Building Permit Fees for the ground related commercial component of the project.
 - c) 100% of Planning Application Fees for the entire project.
3. Tax Increment Grant is for the incremental tax on the ground related commercial portion of the development.

7.3.3 Brownfield Redevelopment:

1. The following costs associated with Brownfield redevelopment will be paid back through a tax increment based grant:
 - a) Costs of preparation of a Phase One and Phase Two Environmental Site Assessment, or
 - b) Costs to prepare a Risk Assessment to Table 2 Standard
 - c) Costs of Preparing a Remediation and Monitoring Plan
 - d) 50% of costs of rehabilitating the property to permit a record of site condition to be filed with the Ministry of the Environment and Climate Change, and

- e) 50% of the cost of complying with a certificate of property use issued under section 168.6 of the Environmental Protection Act.
2. The foregoing costs shall be capped to the lesser of the value of the total of the tax increment grant or the costs of studies and remediation.
3. Only those remediation costs incurred after the execution of an agreement with the City will be eligible for rebate. Remediation costs that have previously been incurred by the applicant are not eligible for the program funding.
4. These studies shall be done by a Qualified Person as required under the applicable legislation.

7.4 Redevelopment Grant Payment

7.4.1 Affordable Housing:

1. The grant for affordable housing will be paid out at different times depending on the type of affordable housing developed. The timing of the grant payment for the different types of affordable housing is outlined as follows:
 - a) Emergency Housing and Transitional Housing:
 - The applicable percentage of Development Charges Equivalent, Building Permit Fees Equivalent and Planning Application Fees Grant will be paid at the time of building permit application.
 - b) Social and Affordable Rental Housing:
 - The applicable percentage of Development Charges Equivalent, Building Permit Fees Equivalent and Planning Application Fees are to be paid by the applicant when required and the total grant is paid after the project is completed and at least 50% occupancy is confirmed.
 - c) Affordable Not-for-Profit or Charitable Home ownership:
 - The applicable percentage of Development Charges Equivalent, Building Permit Fees Equivalent and Planning Application Fees Equivalent Grant will be paid at the time of building permit application.
 - This type of ownership model shall be funded to a maximum of five units per year, on a first come first serve basis.
 - Notwithstanding any other provisions of this CIP, any applications for this type of ownership may be considered eligible for the grant for projects initiated where applicable DC charges, building permit and planning application fees were paid on or after January 1, 2016.
2. Affordable Housing Redevelopment Grants shall be paid from a CIP reserve fund.
3. In the case of Emergency Housing and Transition Housing, and Affordable Not-for-Profit or Charitable Home ownership, the Affordable Housing fees and charges grant payment will be transferred from the CIP reserve fund into the applicable Development Charges, Building Permit Fees, or Planning Application Fees account at the time these will be required under the program.

4. In the case of Social Housing and Affordable Rental Housing, the applicant shall pay the applicable development charges, building permit fees or planning fees at the time required, and the grant will be paid from the CIP reserve account when 50% occupancy of the building is confirmed.

5. Affordable Housing Tax Increment Grant Payment:

a) The repayment of the incremental tax increase will occur over a maximum period of five years.

b) The annual grant payable will be equal to a percentage of the tax increment paid for the City's portion on the property taxes, in decreasing percentages of the increment, and the balance of the increment shall be allocated to a CIP Reserve account as follows:

Year	Percentage of Tax Increment	Percentage to CIP Reserve
1 (pro-rated)	100%	0
2	100%	0
3	75%	25%
4	50%	50%
5	25%	75%

d) The tax increment shall be calculated as the difference between:

i) the annualized municipal taxes resulting from the increased assessment from project completion, as provided by Municipal Property Assessment Corporation (MPAC), adjusted if applicable by subsequent assessment appeal decisions, and

ii) the annualized municipal taxes based on assessment the day before the effective date of the assessment increase noted in (a) above.

e) Properties that are developed that are exempt from taxes, shall not be eligible for the tax increment grant.

f) Where properties that are not previously subject to taxes are redeveloped, the base tax shall be based on the tax that would be applied to the land and buildings based on the current use. For example, a municipal property or church converted to a commercial use shall not have a zero base tax from which to calculate the tax increment.

g) The grant for Year 1 will be pro-rated based on the effective date for the increased assessment.

h) This program does not exempt property owners from increases or decreases in municipal tax rate changes relating to provincial capping legislation or from changes in assessment for any other reason.

i) The starting point for taxes levied on cleared or partially cleared parcels shall be based on the municipal taxes levied the day before clearance.

6. In all cases, an agreement shall be in place confirming the affordable tenancy which shall be retained as such for a period of 10 years from the date of payment of the grant. In

cases where a project also receives Federal, Provincial or County assistance or a combination thereof, the greater of the time periods shall apply.

7.4.2 Intensification Area Grant (Intensification Nodes/Corridors/Urban Growth Centre)

1. The 50% Charges and Fees Grant and Tax Increment Grant for the commercial components of a development shall be payable upon Municipal Property Assessment Corporation (MPAC) re-assessment of the property after development or redevelopment has occurred.
2. Intensification Area Tax Increment Grant Payment
 - a) The Tax Increment Grant shall be paid through the incremental taxes upon MPAC re-assessment of the property after development or redevelopment has occurred.
 - b) The repayment will occur over a maximum period of five years.
 - c) The total payment through the tax increment based grant shall not exceed the cost of redevelopment. If the costs exceed the tax increment based grant for the project, the limit shall be established by the five year tax increment based grant payment schedule.
 - d) The annual grant will be equal to a percentage of the tax increment paid for the City's portion on the property taxes, in decreasing percentages of the increment as follows:

Year	Percentage of Tax Increment	Percentage to CIP Reserve
1 (pro-rated)	100%	0
2	100%	0
3	75%	25%
4	50%	50%
5	25%	75%

- e) The tax increment shall be calculated as the difference between:
 - i) the annualized municipal taxes resulting from the increased assessment from project completion, as provided by Municipal Property Assessment Corporation (MPAC), adjusted if applicable by subsequent assessment appeal decisions, and
 - ii) the annualized municipal taxes based on assessment the day before the effective date of the assessment increase noted in (2) above.
- f) Where properties that are not subject to taxes are redeveloped, the base tax shall be based on the tax that would be applied to the land and buildings based on the current use. For example, a municipal property or church converted to a commercial use shall not have a zero base tax from which to calculate the tax increment.
- g) The grant for Year 1 will be pro-rated based on the effective date for the increased assessment.

- h) This program does not exempt property owners from increases or decreases in municipal tax rate changes relating to provincial capping legislation or from changes in assessment for any other reason.
- i) The starting point for taxes levied on cleared or partially cleared parcels shall be based on the municipal taxes levied the day before clearance.

7.4.3 Brownfield Redevelopment:

1. Brownfield Tax Increment Grant shall cover the eligible costs for Brownfield redevelopment to be paid through a Tax Increment Grant upon re-assessment of the property after redevelopment has occurred.
 - a) The repayment will be for the lesser of total eligible costs and the tax increment grant payment over five years as outlined in c) below.
 - b) The annual grant will be equal to a percentage of the tax increment paid for the City's portion on the property taxes, in decreasing percentages of the increment as follows:

Year	Percentage of Tax Increment	Percentage to CIP Reserve
1 (pro-rated)	100%	0
2	100%	0
3	75%	25%
4	50%	50%
5	25%	75%

- c) If the sum of eligible costs is less than the total paid out over the five year period, then the repayment schedule shall be ended when the full amount of eligible costs is paid out. The final year payment would then not need to be based on the percentage amount set out in the above table.
- d) If the eligible costs exceed the amount paid out by the end of the five year period no further payments will be made.
- e) The tax increment shall be calculated as the difference between:
 - i) the annualized municipal taxes resulting from the increased assessment from project completion, as provided by Municipal Property Assessment Corporation (MPAC), adjusted if applicable by subsequent assessment appeal decisions, and;
 - ii) the annualized municipal taxes based on assessment the day before the effective date of the assessment increase noted in a) above.
- f) Where properties that are not subject to taxes are redeveloped, the base tax shall be based on the tax that would be applied to the land and buildings based on the current use. For example, a municipal property or church converted to a commercial use shall not have a zero base tax from which to calculate the tax increment.
- g) The grant for Year 1 will be pro-rated based on the effective date for the increased assessment.

- h) This program does not exempt property owners from increases or decreases in municipal tax rate changes relating to provincial capping legislation or from changes in assessment for any other reason.
- i) The starting point for taxes levied on cleared or partially cleared parcels shall be based on the municipal taxes levied the day before clearance.

7.5 Redevelopment Grant Program Delivery and Process

1. Approval of all redevelopment grants shall be delegated to a Redevelopment Grant Review Group comprised of the General Manager of Infrastructure and Growth Management, the General Manager of Community and Corporate Services, and the Executive Director of Invest Barrie.
2. All applicants for financial assistance will be required to complete an application form outlining the location of the property, the type and nature of the improvements or development to be undertaken, the anticipated completion date, the estimated value of the project and the financial incentives applied for.
3. A grant application shall be submitted at the time of Site Plan application and will be reviewed in parallel to the Site Plan application.
4. Staff may provide feedback on a redevelopment grant application at the Site Plan Pre-consultation stage, at which time basic eligibility will be determined in conjunction with the Planning Department review.
5. Planning staff will evaluate the grant application for compliance with eligibility requirements and circulate the grant application for comments to applicable departments and provide a summary of comments to the landowner.
6. Upon receipt of an amended Site Plan to address the comments and recommendations from the Site Plan review, the landowner will submit a final grant application with amended Site Plan requirements including enhanced requirements for the grant application.
7. All projects are subject to funding availability, in consultation with the Finance Department.
8. If approved, conditional approval shall be granted and a Redevelopment Grant Agreement shall be prepared. The legal fees for this agreement and costs of registration on title may be recovered from the grant or may be added to the eligible costs funded through the tax increment.
9. A project may be eligible for more than one of the incentives under the Redevelopment Grant Program where all the elements are included. In these instances the incentives may be added on to each project however, the total maximum amount of all grants or loans shall not exceed the total cost of redevelopment.
10. Where planning applications fees are costs permitted in more than one grant (for example Affordable Housing within an Intensification area), this grant of greater value shall apply.

7.6 Prioritization of Affordable Housing

1. Generally, developments within the Intensification areas shall be required to meet the applicable Official Plan and Zoning standards, including density, built form, and urban design requirements.
2. Where special planning approvals are needed to facilitate the provision of affordable housing projects that do not meet all these requirements, Council shall have an opportunity to determine eligibility for the applicable Affordable Housing Redevelopment Grant Program in light of the special provisions needed to permit the affordable housing project, at the time of consideration of the planning application.

8.0 Renovation and Redevelopment Grant Program Rules and Requirements

1. The provision of any grant as described in Part B of this CIP shall be administered on the basis of merit and the limit of funding available in accordance with administrative rules governing the loan or grant programs.
2. Specific details regarding the grants, application and administration procedures shall be set out in the Grant Application Forms and may change from time to time without the need for an amendment to this Community Improvement Plan.
3. Terms and conditions of any incentive program, including interest, repayment terms and administrative procedures may be changed, altered, amended or modified by the City of Barrie without the necessity of an amendment to this CIP.
4. Any of the foregoing Grant Programs may be structured as loans or forgivable loans if necessary, to secure City interests.
5. Development or redevelopment carried out prior to approval of *The Built Boundary CIP* shall not be eligible for funding, except for Not-for-Profit or Charitable Sweat Equity units constructed after January 1, 2016.
6. Eligible costs for redevelopment or improvements incurred prior to an application under *The Built Boundary CIP* shall not be eligible for funding.
7. Where DC discounts are already in place through the Development Charges By-law, the grants will be based on the greater of the two.
8. Incentive programs will be available to a property owner only. The City may extend the original grant payment schedule to a new owner subject to an amended agreement with the new owner.
9. Tax Increment Grant payments to the original owner will cease if the original owner sells the property prior to payment of all installments per the Tax Increment Grant Schedule, and the Grant has not been transferred or assigned through an agreement to the new owner.
10. Assistance granted under any financial incentive program for a particular applicant is not transferable to any other property.
11. All applicant(s) will be required to enter into an agreement with the City of Barrie specifying the amount to be paid by the City and the payment period. In all cases, the property owner must consent to the agreement in writing.

12. Eligible properties and buildings shall have no outstanding charges, legal claim, lien or tax arrears that may affect title to the land.

9.0 Municipal Acquisition, Disposal, Investment, Holding or Clearance of Land

1. In some instances, such as the provision of affordable housing, direct action on the part of the municipality may be appropriate to realize the objectives as outlined in Part B Section 3.0 of this plan.
2. Council may undertake any or a combination of the following as set out in Section 28(3) of the Planning Act:
 - a) Acquire land within the Built Boundary Community Improvement Project Area without the approval of the Minister, after the CIP is approved;
 - b) Hold land acquired within the Built Boundary Community Improvement Project area; and
 - c) Clear, grade, or otherwise prepare the land for community improvement.
3. Council may also undertake any or a combination of the following as set out under Sections 28(6) of the Planning Act:
 - a) Construct, repair, rehabilitate or improve buildings on land acquired or held by the municipality in the Built Boundary Community Improvement Project Area in conformity with the CIP and sell, lease or otherwise dispose of any such buildings and land appurtenant thereto.
 - b) Sell, lease or otherwise dispose of any land acquired or held by the municipality in the Community Improvement Project Area for a use in conformity with the CIP.
4. The City may prioritize lands or areas for undertakings as described in 2 and 3 above.
5. As part of exercising the powers granted under Section 28 of the Planning Act, the City shall prepare a report available for the public which will outline the following:
 - a) Identification and description of the strategies to be employed.
 - b) The purpose and objective of the undertaking.
 - c) The role of the municipality and other parties in the undertaking.
 - d) The financial implications for the municipality.
 - e) The potential timing of the undertaking.

10.0 Implementation

1. The Built Boundary CIP will be implemented through the provisions of Section 3.6 of the Official Plan and Section 28 of the Planning Act, 1990, R.S.O.
2. Overall implementation of the grant program shall be subject to Council review and approval of program details and budgetary allocation.

3. Approval of grants would be delegated to City staff. In the case of Renovation Grant Program, this shall be the Director of Planning and Building Services. In the case of the Redevelopment Grant Programs, this shall be delegated to an interdepartmental panel of senior staff comprised of the General Manager of Infrastructure and Growth Management, the General Manager of Community and Corporate Services and the Executive Director of Invest Barrie. This group is referred to as the Redevelopment Grant Review Group in this document.
4. All programs outlined in Part B of this Community Improvement Plan may be considered upon funding approval of this Plan, after approval of this CIP. Retroactivity of the program prior to approval shall not apply.

11.0 Administration

1. The *Built Boundary CIP* and the *Financial Incentives Programs* shall be administered by the City of Barrie Planning and Building Services and Finance Departments.

12.0 Other Community Improvement Plans:

1. The Downtown: Next Wave Community Improvement Plan and the Allandale Community Improvement Plan only apply insofar as review and implementation of applications received up to and including April 30, 2016. Any current grants or forgivable loans offered under these programs will continue to be maintained in accordance with the program details of these Community improvement plans.
2. The Georgian College Community Improvement Plan provides specialised grants for developments providing student housing. The Georgian College CIP shall remain in effect. Applications within the Georgian College CIP area may either be made under this Built Boundary CIP or the Georgian College CIP; however, applications may only be eligible under one of these CIPs. If applications are submitted under one CIP, it will be ineligible to apply under the other CIP.

13.0 Financing of Incentives

1. Council may approve an annual budget for these incentive programs.
2. The balance of the percentage paid out through the Tax Increment Based Grant Programs may be assigned to a CIP Reserve fund in order to build up funds and to have funds available for the Affordable Housing Grants, where these are to be paid at the front end.
3. All of the programs described in Part B and further detailed in Appendices are to be funded by the City of Barrie or in conjunction with such other Federal or Provincial programs which may be available.

14.0 Monitoring and Revisions to the Built Boundary CIP

Records of all grants and incentives awarded shall be maintained and the following shall be documented:

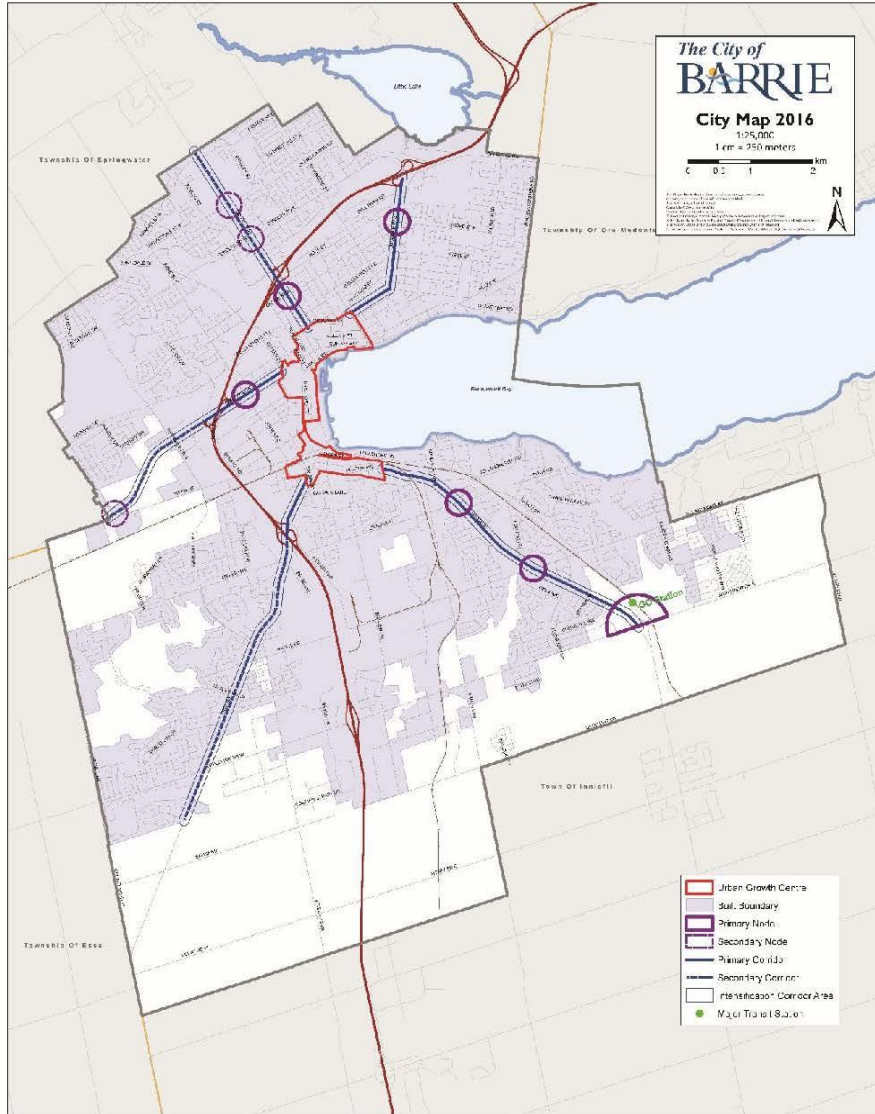
1. Renovation Grant:
 - a) Number and location of grants.
 - b) Number of jobs or units added.
 - c) Floor area of ground related commercial added.
 - d) Number and location of listed properties upgraded.

2. Redevelopment Grants:
 - a) Number and type of Development or Redevelopment Projects (based on the Continuum of Affordable Housing Units provided through the program.
 - b) Value of loans for development ground floor commercial space.
 - c) Additional commercial floor area.
 - d) Floor area of additional office space added.
3. Annual reviews and tracking of programs and activities relating to the Built Boundary CIP shall be submitted to Council.
4. As a result of this review; terms, conditions and details of any grant program may be changed, altered, amended or modified by the City of Barrie with direction from Council.
5. The addition of a new grant or loan program shall require an amendment to this CIP; however, the City of Barrie may discontinue any program without requiring an amendment to this Plan.

15.0 Interpretation

Part B Sections 1 to 20 inclusive and Schedule "A" attached, unless otherwise stated, shall form the Built Boundary CIP.

Schedule "A" – Community Improvement Project Area Boundary



APPENDIX "A" TO BUILT BOUNDARY CIP

RENOVATION GRANT EVALUATION CRITERIA

Criteria	Factor	Score (Points)	Maximum Points
1. Application required on Location Selected Street	For example Year 1 Dunlop Street between Mulcaster Street and High Street		
2.Type of Development	Office and/or residential above grade	10	20
		10	
	At grade commercial	10	
3.Property Description	Vacant Building	10	10
	Partially Vacant Building	5	
4.Conversion Type	Pre-existing vacant space	10	10
	Renovation	5	
5.Employment	More than 8+ jobs	8	20
	Less than 8 jobs	4	
	High Potential Jobs	8	
6.Residential Units Added	5+	10	10
	2-5	5	
	1	5	
7.Sustainability	<ul style="list-style-type: none"> • LEEDS or equivalent • Energy Saving Measures 		10
8.Design	<ul style="list-style-type: none"> • Materials utilized • Contribution to heritage preservation and character of the area • Accessibility • Landscaping • Signage 		20
			100

APPENDIX "B" TO BUILT BOUNDARY CIP

HOUSING SPECTRUM - LEVEL OF GRANT

Emergency Housing Facilities	Transitional Housing Facilities	Social Housing and Affordable Not-for-Profit or Charitable Home ownership (Sweat Equity models)	Affordable Rental Housing
DC Equivalent Grant			
100% DC Equivalent Grant	75% DC Equivalent Grant	50% of DC Equivalent Grant	25% of DC Equivalent Grant
Application Fee Grant			
100% Building Permit Equivalent Fees	75% Building Permit Equivalent fees	50% Building Permit Equivalent fees	25% Building Permit Equivalent fees
100% Planning Application Fees based on the percentage of Emergency Housing Facilities provided within a redevelopment project	75% Planning Application Fees based on the percentage of Transitional Housing facilities provided within a redevelopment project	50% Planning Application Fees based on the percentage of Social Housing units provided within a redevelopment project	25% Planning Application Fees based on the percentage of Affordable Rental Housing Units provided within a redevelopment project
Tax Increment Grant Applicable to All based on the Percentage of Affordable Units Provided			
Year	Percentage of Tax Increment	Percentage to CIP Reserve	
1 (pro-rated)	100%	0	
2	100%	0	
3	75%	25%	
4	50%	50%	
5	25%	75%	

Definitions of the Spectrum of Affordable Housing:

- a) Emergency Housing is housing that provides short term interim housing such as shelters, to address an immediate need to take a person or persons out of a harmful or high risk situation.
- b) Transitional Housing is temporary accommodation to bridges the gap from homelessness to permanent *housing* by offering support services structure, supervision, to facilitate integration into permanent occupation. Support may include education and training, translation services, life skills as appropriate to the situation.
- c) Social Housing may include Not-for-Profit Housing, Rent Geared to Income Housing, Urban Native Housing, or any form of rental housing where rental costs are supplemented with government subsidy. This may include co-op housing supported by the housing service provider.
- d) Affordable Rental Housing: is as defined in the City of Barrie Official Plan and Provincial Policy Statement which is as follows:

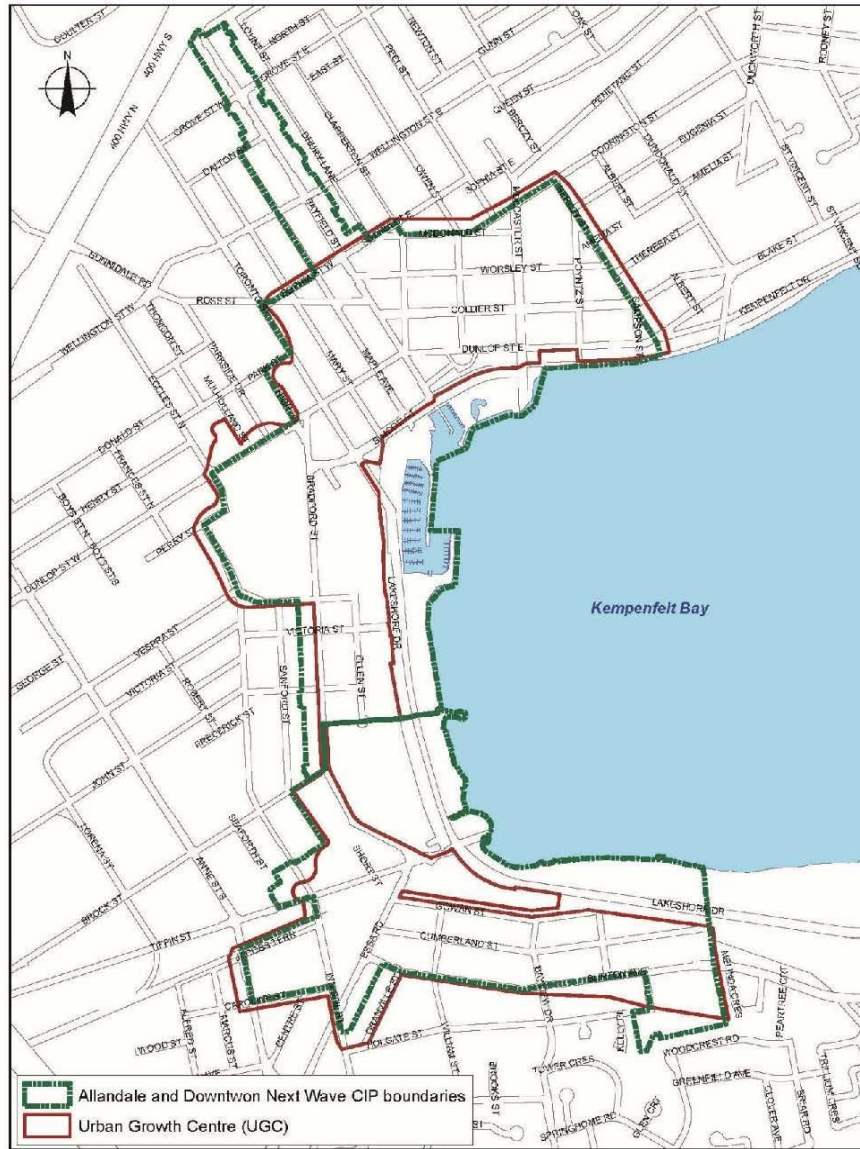
Affordable Rental Housing is defined as the least expensive of:

- i) A unit for which the rent does not exceed 30% of the gross annual household income for low and moderate income households; or

- ii) A unit for which the rent is at or below the average market rent of a unit in the regional market area.

The monthly affordable rental rate and market region may be based on annual price points as determined by the County of Simcoe as the Service Provider, or as otherwise defined by CMHC or other Federal, Provincial or Local Service provider. This will be reviewed on an annual basis and changes included in the Grant Application Form.

APPENDIX "C"
Comparison of UGC Boundary and Allandale and Downtown CIP's



APPENDIX "D"
Comparison of Proposed Built Boundary CIP and Downtown/Allandale CIPs

PROPOSED BUILT BOUNDARY CIP	DOWNTOWN AND ALLANDALE CIPS
1. General	
Area of Coverage: Urban Growth Centre Built Boundary Intensification Nodes and Corridors	Area of Coverage: Urban Growth Centre
Two Grant Programs Renovation Grant Redevelopment Grant	Several Grant and Loan Programs Façade, Adaptive Re-use and Upgrade to Building Code and Sign and artwork forgivable loans SLED Grant (safe energy efficient lighting) Building Permit Fees Grant Planning Application Fees Grant Tax Increment Based Grant
2. Small Scale Projects	
Renovation Grant: <ul style="list-style-type: none"> • Façade and sign, adaptive re-use, renovation, restoration • Maximum \$25,000 per building • Applies to listed buildings on the Municipal Heritage Register, in the UGC and Built Boundary 	Forgivable Loans: <ul style="list-style-type: none"> • Façade and Sign, adaptive re-use, upgrade to building code improvements. • Maximum \$25,000 per façade or adaptive reuse project • Maximum \$5,000 for sign or artworks • Some properties listed as Heritage Resources in Allandale are eligible for a renovation loan Small Grants: <ul style="list-style-type: none"> • 25% Building permit fees • Planning application fees • SLED – Safe Energy Efficient Outdoor Lighting, maximum \$10,000 per fixture
Approval : Renovation Grants Delegated to the Director of Planning and Building Services.	Approval: Forgivable Loans and Small Grants under \$100,000 Delegated to the Director of Planning (and Building) Services.
3. More Significant Projects	
Redevelopment Grant <ul style="list-style-type: none"> • Affordable Housing • Intensification Area Redevelopment • Brownfield Redevelopment • Affordable Housing and Brownfield applies to Built Boundary and Intensification Areas, including UGC • Intensification Area Redevelopment applies to Intensification Nodes, Corridors, and UGC 	Grants for Projects over \$100,000 and at least \$50,000 Assessment Increase <ul style="list-style-type: none"> • Rental Accommodation (regardless of affordability) • Commercial development • Downtown and Allandale CIP areas only (UGC)
Intensification Area Re/development Commercial component only Fees and Charges Grant paid through a CIP Reserve Fund: <ul style="list-style-type: none"> • 50% Development Charges • 50% Building Permit Fees • 100% Planning Application Fees Tax Increment Grant for Incremental Taxes on	Commercial Development in Allandale or Downtown CIP area (UGC) Planning and Building Permit Fees <ul style="list-style-type: none"> • Building Permit Fees 25% for first \$25,000 and 50% for balance of fees • 100% of Planning Application Fees Tax Increment Based Grant – incremental taxes for

<p>Ground Related commercial based on the Table below:</p> <table border="1"> <thead> <tr> <th></th> <th>To Applicant</th> <th>To CIP Reserve</th> </tr> </thead> <tbody> <tr> <td>Year 1</td> <td>100% pro-rated</td> <td>-</td> </tr> <tr> <td>Year 2</td> <td>100%</td> <td>-</td> </tr> <tr> <td>Year 3</td> <td>75%</td> <td>25%</td> </tr> <tr> <td>Year 4</td> <td>50%</td> <td>50%</td> </tr> <tr> <td>Year 5</td> <td>25%</td> <td>75%</td> </tr> </tbody> </table>		To Applicant	To CIP Reserve	Year 1	100% pro-rated	-	Year 2	100%	-	Year 3	75%	25%	Year 4	50%	50%	Year 5	25%	75%	<p>commercial and rental residential only based on the table below:</p> <table border="1"> <thead> <tr> <th></th> <th>To Applicant</th> </tr> </thead> <tbody> <tr> <td>Year 1</td> <td>100% pro-rated</td> </tr> <tr> <td>Year 2</td> <td>100%</td> </tr> <tr> <td>Year 3</td> <td>75%</td> </tr> <tr> <td>Year 4</td> <td>50%</td> </tr> <tr> <td>Year 5</td> <td>25%</td> </tr> </tbody> </table>		To Applicant	Year 1	100% pro-rated	Year 2	100%	Year 3	75%	Year 4	50%	Year 5	25%
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<p>Brownfield Redevelopment</p> <p>Costs of studies and remediation costs associated with brownfield remediation paid through a Tax Increment Based Grant based on the same table as for intensification area redevelopment.</p>	<p>No Grants for Brownfield Redevelopment</p>																														
<p>Approval:</p> <p>Redevelopment Grants are delegated to a Redevelopment Grant Review Group comprised of General Manager of Infrastructure and Growth Management, the General Manager of Community and Corporate Services, and the Executive Director of Invest Barrie.</p>	<p>Approval:</p> <p>Tax Increment Based Grants, combined with Permit & Application Fees Grants over \$100,000 Decision of Council – A staff report from Planning and Building Services with a recommendation.</p>																														
<p>CIP Grants factor in a percentage of DC equivalent payment for Affordable Housing and Intensification Area Grants.</p>	<p>DC costs are not part of the Downtown and Allandale CIPs.</p>																														
<p>Where DC Discounts or Exemptions are in place, such as discounts for Commercial Development in the City Centre Planning Area, the grants will be based on the greater of the two.</p>	<p>Any DC discounts or exemptions are part of the DC By-law and are not included in the Downtown or Allandale CIPs.</p>																														

APPENDIX "E"
Summary of Further Public Input

A. Mr. George Hunter and Mr. Cliff Dyke of EDEV Realty Advisors Inc.

1. Staff met with Mr. George Hunter and Mr. Cliff Dyke of EDEV Realty Advisors Inc. to discuss the proposed incentives under the new CIP. Mr. Hunter and Mr. Dyke are of the opinion that a Tax Increment Based Grant should be extended to all rental residential projects within the Urban Growth Centre and Intensification Nodes and Corridors to support residential intensification for rental projects. Eligibility would be premised on including a minimum of 10% of affordable units integrated into the total development, in support of the Official Plan Goal and Provincial Policy to develop a minimum of 10% of affordable units per annum.

Two Tax alternatives were suggested:

- a) That the same tax increment based grant available for rental residential in the Downtown CIP should be made available for rental residential units developed in the Urban Growth Centre, and Intensification Nodes and Corridors.
- b) That the redevelopment grant proposed for commercial development in the intensification nodes and corridors and urban growth centre under the proposed Built Boundary CIP be extended to rental residential development in these same areas (That is 50% of the DC charges and building permit fees and applicable planning application fees be paid through a tax increment based grant over the five year period for the rental residential component).

In both of the foregoing options, the intention is that this would replace the proposed incentive for affordable housing in the proposed Built Boundary CIP where applicable.

2. In response to staff concerns with respect to applying public funds to incentivise the luxury rental segment, Mr. Hunter commented that this was a limited and somewhat exclusive sector of the market; however this could be addressed by establishing a base level tied to the CMHC average rental published twice a year for studio, one, two and three bedroom unit types. The suggested average by Mr. Hunter was the CMHC Average+75% to capture the mid-priced market segment.

Comment

3. The original recommendation from staff was to incent purpose built rental below the average market rent on the basis that public funds should be used to support projects that were truly providing affordable housing. Staff can support incenting purpose built rental at average market rents based on the premise that an increase in rental units at or below average rents will assist in increasing the supply of rental housing.
4. Since discussions with Mr. Hunter and Mr. Dyke the CIP has been amended to include a proposed Tax Increment Based Grant for the complete affordable housing spectrum including units developed at or below average market value/affordable units, based on the percentage of these units within a development.
5. In staff's view the recommended incentives proposed in the CIP should be monitored for the next several years to determine whether there is a need to further incentivise above market rental residential development within the intensification areas.

B. Mr. Ray Duhamel representing Mr. Michael Hassey:

1. Mr. Ray Duhamel, representing Mr. Michael Hassey on a proposed rental development, indicated that the proposed grant at 25% of DC and Building permit fees per unit is not a meaningful incentive to construct an affordable unit if the units are to remain affordable over an extended period of time. Mr. Duhamel advises that the proposed grant per unit at 25% of DC for a one bedroom apartment would equate to approximately \$5,000 per unit which amounts to \$21.00 per month over a twenty year time frame, and \$42.00 per month over a 10 year time-frame, and the business risk is too significant be tied to a certain rent, when the market could theoretically bring significantly more in years 10-20.

Comment:

2. The proposed CIP has been revised to reduce this time frame to 10 years, unless federal or provincial assistance requiring a longer time frame applies.

Appendix "F"

Extract from Staff Report PLN009-16 Financial Section of the Report.

FINANCIAL

Funding of Proposed Renovation Grant Program

41. Staff recommend that these grants be funded in a similar way to the current small forgivable loans through an annual budgetary process. Stable predictable funding would facilitate administration of this program. In review of past years for small grants and forgivable loans, the annual budgetary amount assigned has been between \$150,000 and \$250,000 for forgivable loans and small grants. For the past five years, the full amount has been allocated to applications received by the end of the summer of any year. New applications received after that date are held for consideration in the following year subject to budgetary approval.
42. If funding is approved, staff would be in a position to commence processing Renovation Grants under the proposed Built Boundary CIP in 2017.

Funding of Redevelopment Grant Program

43. Emergency Shelters and Transition Housing Grants are proposed to be paid at the time of building permit application, whereas grants for social housing and affordable rental housing are paid after the building is developed and 50% occupied. Thus funding would be required earlier in the process for Emergency Shelters and Transition Housing Grants. Staff are not aware of any proposed emergency shelters or transition housing development at this time, however, it is possible that with the proposed incentives in place, the City may receive an application for any one of these types of affordable housing projects. Until such time as sufficient funds are available in the CIP reserve fund to cover the grant payments, Council approval of funding will be necessary before any such CIP applications can be approved.
44. Redevelopment Grants that are funded through the tax increment based program would be paid after the development is completed and the increased taxes are paid. It is likely that any projects considered and approved in 2016 under this program would need to be paid in 2018 at the earliest. Thus there is no direct budgetary impact to be considered for this type of project at this time.
45. Since the CIP reserve would not have been built up through tax increment grants by 2017, funds will be needed for Affordable Housing Grants that may be received in 2016 and 2017. While staff are not aware of any proposals at this time, it will be suggested that some funds be set aside in the CIP reserve for this type of project in the 2017 budget.
46. Staff are recommending that a percentage of taxes collected from a project approved under the proposed CIP Tax Increment Grant program be allocated to the CIP reserve account in order to build up this account. As shown on the table below, a percentage would be paid out to cover costs of development and the remaining percentage would be placed in the account to fund future affordable housing projects that need a direct grant, or that would benefit from some front end funding.

TABLE A – Tax Increment Based Payment Schedule

Tax Increment Grant Payment to Applicant	Tax Increment Revenue Allocated to the Redevelopment Grant for Future Projects Needing Front End Funding
Year 1 – 100% pro-rated	0%
Year 2 – 100%	0%
Year 3 – 75%	25%
Year 4 – 50%	50%
Year 5 – 25%	75%

47. The effect would be that the additional taxes realized through increased assessment for CIP projects would be paid to the applicant or kept in a reserve account to finance future projects for the first five years as outlined in the table above.
48. Until such time as sufficient funds are available in the CIP reserve fund through diverting a portion of the increased taxes from the Tax Increment Grant approved projects, the reserve fund would require an annual budgetary allocation. In cases where an application is received and there is no budgetary allocation for these applications, funding approval will require Council consideration.

Council Resolution



City of Barrie

70 Collier Street (Box 400)
Barrie, ON L4M 4T5

Direction Memos

City Council

October 3, 2016

16-G-218 PROPOSED BUILT BOUNDARY COMMUNITY IMPROVEMENT PLAN REVIEW OF STAFF REPORT PLN009-16

1. That a new Community Improvement Plan (CIP), known as the Built Boundary Community Improvement Plan, be approved as outlined in Appendix "A" to Staff Report PLN016-16.
2. That Schedule "A" of By-law 2016-001 illustrating the Built Boundary Community Improvement Project Area be deleted and replaced with Schedule "A" attached to the Built Boundary Community Improvement Plan in Appendix "A" to Staff Report PLN016-16.
3. That the additional taxes realized through increased tax assessment relating to CIP projects, that are not paid to the applicant, as outlined in sections 7.4.1 5.b); 7.4.2 2.d) and 7.4.3 1.b) in the attached Built Boundary CIP, be transferred to the CIP Reserve to fund future CIP Projects. (PLN016-16) (File: D18-BUI) (P35/15)

Directions Memo:

Director of Planning and Building Services - note
Director of Legislative and Court Services - prepare By-law
Director of Finance - note