



Downtown Tomorrow

Community Improvement Plan



June 2016



CONTENTS

1.0	Introduction	1
1.1	Purpose	1
1.2	Study Area	1
1.3	General Methodology	2
1.4	Report Content	3
2.0	Legislative Framework	4
2.1	Municipal Act, 2001	4
2.2	Planning Act	5
2.3	Ontario Heritage Act	6
2.4	Development Charges Act	7
3.0	Policy Background	8
3.1	Provincial Policy Statement, 2014	8
3.2	Growth Plan for the Greater Golden Horseshoe	8
3.3	Strategic Plan	10
3.4	Economic Development Strategy	10
3.5	Official Plan	10
3.6	Zoning Bylaw	14
3.7	Sign By-law	14
3.8	Downtown Tomorrow Plan	15
3.9	Heritage Conservation District Study	16
3.10	Existing Community Improvement Plans and Incentive Programs	16
3.11	Downtown Orillia Management Board Strategic Plan	17
4.0	Consultation	18
4.1	Project Review Team	18
4.2	Interviews	18
4.3	Public Information Session and Workshops	18
4.4	Council Workshop Session	20
4.5	Project Website	20
5.0	Community Improvement Needs	21
5.1	Purpose	21
5.2	Methodology	21
5.3	Community Improvement Needs	21
6.0	Community Improvement Project Area	26

CONTENTS

7.0	Design Principles	28
7.1	Purpose	28
7.2	Basis	28
7.3	How to Use the Design Principles	28
7.4	Design Principles and Guidelines	29
8.0	Incentive Programs	40
8.1	Approach	40
8.2	General Program Requirements	42
8.3	Feasibility/Design Study Grant Program	44
8.4	Façade Improvement Grant Program	45
8.5	Building Improvement Grant Program	47
8.6	Residential Grant Program	49
8.7	Brownfields Tax Assistance Program	50
8.8	Tax Increment Grant Program	53
8.9	Development Charge Grant Program	55
8.10	Fees Grant Program	57
9.0	Tying in the Downtown Tomorrow Plan	58
10.0	Monitoring Program	60
10.1	Purpose	60
10.2	Description	60
10.3	Program Adjustments	62
11.0	Marketing Strategy	63
11.1	Key Objectives and Messages	63
11.2	Target Audience	63
11.3	Marketing Tools	64
12.0	Implementation Strategy	65
11.1	Basis	65
11.2	Purpose	65
11.3	Priorities	65
13.0	Conclusion	68

CONTENTS

Figures

1	Study Area	2
2	Existing Community Improvement Project Areas	17
3	Community Improvement Project Area	27
4	The Downtown Tomorrow Plan and the Community Improvement Plan	58
5	CIP Incentive Programs Help Implement Following DTP Initiatives	59
6	DTP Initiatives that Potentially Support the CIP	59

Tables

1	Summary of Incentive Programs	41
2	Monitoring Variables	61
3	Implementation Strategy	66

Appendices

A	City of Orillia Official Plan – Community Improvement Policies	69
B	Public Information Session and Workshop #1 Consultation Summary	77
C	Public Information Session and Workshop #2 Consultation Summary	80
D	Administration of the Feasibility/Design Study Grant Program	84
E	Administration of the Façade Improvement Grant, Building Improvement Grant, and Residential Grant Programs	88
F	Administration of the Tax Increment Grant Program	92
G	Administration of the Brownfields Tax Assistance Program	96
H	Administration of the Development Charge Grant Program	100
I	Administration of the Fees Grant Program	104
J	Performance Requirements for the Development Charge Grant Program	107
K	Applications and Permits Eligible for the Fees Grant Program	109

1.0 INTRODUCTION

1.1 Purpose

The City of Orillia retained RCI Consulting in association with GSP Group Inc. to prepare a Community Improvement Plan (CIP) for Downtown Orillia. The preparation of this CIP was one of the main recommendations contained in the Downtown Tomorrow Plan (DTP) prepared in 2012. The DTP contains a multi-faceted strategy, a Master Development Concept and 33 recommendations designed to achieve the long-term Vision for Downtown Orillia. This Vision sees Downtown Orillia as:

- Accessible and Inviting;
- Vibrant and Creative;
- Healthy and Livable; and,
- Green and Beautiful.

The role of this CIP is to help achieve the long-term vision in DTP. Therefore, this CIP builds on the analysis in the DTP by applying a “community improvement lens” that focuses on the key community improvement needs in Orillia’s Downtown and programs designed to address these needs and help achieve the Vision for Downtown Orillia in the DTP. As such, this CIP has been titled the “Orillia Downtown Tomorrow Community Improvement Plan (CIP).

The purpose of this CIP is to:

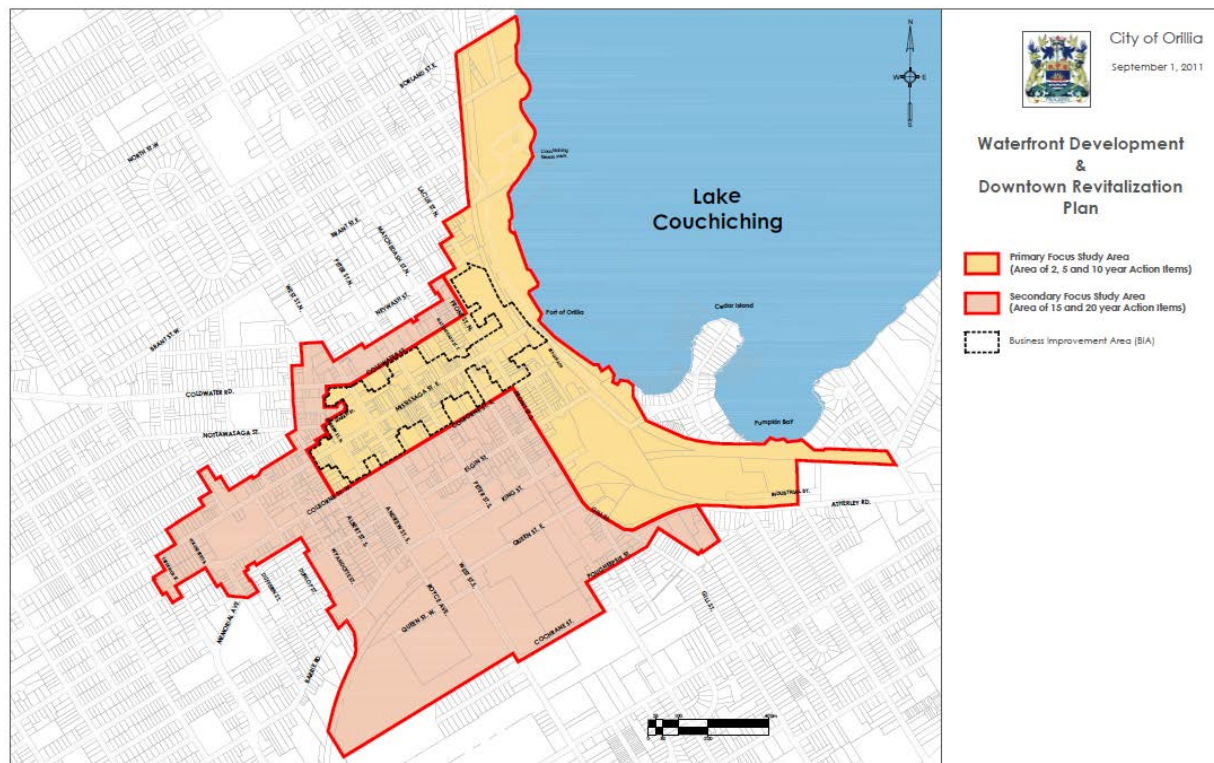
- a) Outline the legislative, policy and planning framework that supports the CIP;
- b) Identify the key community improvement needs in Downtown Orillia based on an analysis of land use, building and property utilization and conditions, business activity, heritage and other characteristics in the area;
- c) Recommend a Community Improvement Project Area (Project Area) for the CIP;
- d) Specify Design Principles and Guidelines that will be used to ensure that projects that take advantage of incentive programs offered under the auspices of this CIP will be high quality, well-designed projects that support the human scale and pedestrian-oriented vision for the Project Area;
- e) Develop a toolbox of incentive programs that can be offered by the City to directly stimulate private sector investment in the revitalization and redevelopment of Project Area; and,
- f) Outline a Monitoring Program, Marketing Strategy and Implementation Strategy that will help the City implement this Plan, market the incentive programs contained within the Plan, monitor the results of these programs, and adjust them as required.

1.2 Study Area

The Study Area used for the CIP is the same study area used for the DTP (see **Figure 1**). This area includes the Historic Downtown Core, Waterfront, Hospital District and the Barrie Road and King Street/Atherley Road Corridors. Lands in the Study Area and properties adjacent to the Study Area were evaluated for inclusion in the Community Improvement Project Area using a number of criteria. This process is described in greater detail in Section 6 of this Plan. The Community Improvement Project Area

shown in Section 5 is the area where the City can offer the incentive programs contained within this Plan and where the Design Principles and Guidelines will be applied.

Figure 1 Study Area



1.3 General Methodology

A number of tasks were completed in order to provide a comprehensive foundation for the preparation of the CIP. This included:

- A review of relevant legislation, and provincial and city planning and policy documents;
- A community improvement needs analysis including an assessment of the physical and economic characteristics in the area based on walking tours of the area, input received from the project review team (PRT), interviews with members of Council and senior City staff, and input received from the public at the first public information session and workshop held on July 14, 2015;
- A review of best practices utilized by other Ontario municipalities facing similar community improvement needs as Downtown Orillia to promote vitalization and development in their downtowns and commercial core areas;
- Using the vision in the DTP to guide preparation of draft incentive programs and draft design principles and guidelines;
- Refinement of the draft incentive programs and draft design principles and guidelines based on input received from the PRT, a second public information session and workshop held on October 27, 2015, and a Council workshop held on November 12, 2015; and,
- Preparation of this final plan.

Additional details regarding the extensive public and stakeholder consultation undertaken during preparation of this plan can be found in Section 4.0.

1.4 Report Content

This CIP is divided into the following sections.

- Section 2 provides a review of the legislative framework for the CIP.
- Section 3 provides a review of the policy, planning and other background documents that are applicable to the CIP.
- Section 4 contains a summary of the consultation taken with various stakeholders during preparation of the plan.
- Section 5 contains the community improvement needs analysis including a summary assessment of land use, building conditions, and business activity and identification of the key community improvement needs in Downtown Orillia.
- Section 6 shows the recommended Community Improvement Project Area for the CIP.
- Section 7 presents the Design Guidelines and Principles that will apply to all projects in the Community Improvement Project Area that apply for the incentive programs contained in this CIP.
- Section 8 contains a comprehensive tool kit of municipal incentive programs specifically designed to help spur private sector building and property improvements, heritage restoration and improvement, and redevelopment and intensification in the Project Area.
- Section 9 discusses the mutually reinforcing relationship between this CIP and the overarching DTP.
- Section 10 contains a monitoring program designed to assist the City in monitoring progress on implementation of the CIP and the economic and other impacts of the programs contained in the CIP.
- Section 11 contains a marketing strategy for the CIP.
- Section 12 contains an implementation strategy that outlines the priorities and timing for implementation of the various actions in this CIP and the key stakeholders who will be involved in implementing these actions.
- Finally, Section 13 provides a brief conclusion to the CIP.

2.0 LEGISLATIVE FRAMEWORK

This section of the report reviews the legislative authority for preparation and adoption of community improvement plans by municipalities in Ontario.

2.1 Municipal Act, 2001

Section 106 (1) and (2) of the *Municipal Act, 2001* prohibits municipalities from directly or indirectly assisting any manufacturing business or other industrial or commercial enterprise through the granting of bonuses. Prohibited actions include giving or lending any property of the municipality, including money; guaranteeing borrowing; leasing or selling any municipal property at below fair market value; and giving a total or partial exemption from any levy, charge or fee.

This prohibition is generally known as the “bonusing rule”. Section 106 (3) of the *Municipal Act, 2001* provides an exception to this bonusing rule for municipalities exercising powers under Subsection 28 (6), (7) or (7.2) of the *Planning Act* or under Section 365.1 of the *Municipal Act, 2001*. It is this exception under Section 28 of the *Planning Act* that allows municipalities with enabling provisions in their official plans to prepare and adopt Community Improvement Plans (CIPs). CIPs provide municipalities with a comprehensive framework for the planning and provision of economic development incentives in areas requiring community improvement.

Section 365.1 of the *Municipal Act, 2001* operates within the framework of Section 28 of the *Planning Act*. A municipality with an approved CIP in place that contains provisions specifying tax assistance for environmental remediation costs will be permitted to provide said tax assistance for municipal property taxes. Municipalities may also apply to the Province to provide matching education property tax assistance through the Province’s Brownfields Financial Tax Incentive Program (BFTIP).

Section 107 of the *Municipal Act, 2001* describes the powers of a municipality to make a grant, including the power to make a grant by way of a loan or guaranteeing a loan, subject to Section 106 of the *Municipal Act, 2001*. In addition to the power to make a grant or loan, these powers also include the power to sell or lease land for nominal consideration or to make a grant of land; provide for the use by any person of land owned or occupied by the municipality upon such terms as may be fixed by Council; sell, lease or otherwise dispose of at a nominal price, or make a grant of any personal property of the municipality or to provide for the use of the personal property on such terms as may be fixed by Council.

In order to encourage good stewardship, maintenance and conservation of locally designated heritage properties, municipalities may, under Section 365.2 of the *Municipal Act, 2001*, pass a by-law to establish a local Heritage Property Tax Relief (HPTTR) Program to provide tax relief (10 to 40 per cent) to owners of eligible heritage properties, subject to an agreement, to protect the heritage features of their property. This financial tool is designed to help owners of heritage properties maintain and restore their properties. An eligible heritage property for this Program is a property or portion of a property that is designated under Part IV of the *Ontario Heritage Act* or is part of a heritage conservation district under Part V of the *Ontario Heritage Act* and that is subject to a heritage easement agreement. The Province shares in the cost of the

Program by funding the education portion of the property tax. Municipalities that adopt the HPTR Program contribute to the Program by funding their portion of the tax.

2.2 Planning Act

Section 28 of the *Planning Act* allows municipalities with provisions in their official plans relating to community improvement to designate by by-law a “community improvement project area” and prepare and adopt a community improvement plan for the community improvement project area. Once the community improvement plan has been adopted by the municipality and comes into effect, the municipality may exercise authority under Section 28(6), (7) or (7.2) of the *Planning Act* or Section 365.1 of the *Municipal Act, 2001* in order that the exception provided for in Section 106 (3) of the *Municipal Act, 2001* will apply.

According to Section 28 (1) of the *Planning Act*, a “community improvement project area” is defined as “a municipality or 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”. It is important to note that there are a variety of reasons that an area can be designated as an area in need of community improvement. The criteria for designation cover physical deterioration, faulty arrangement, unsuitability of buildings and any other social or community economic development reasons.

Section 28 (1) of the *Planning Act* defines “community improvement” as “the planning or replanning, design or redesign, resubdivision, clearance, development or redevelopment, construction, reconstruction and rehabilitation, improvement of energy efficiency, or any of them, of a community improvement project area, and the provision of such residential, commercial, industrial, public, recreational, institutional, religious, charitable, or other uses, buildings, structures, works, improvements or facilities, or spaces therefore, as may be appropriate or necessary”. This represents a wide range of possible municipal actions.

Once a CIP has come into effect, the municipality may:

- i) Acquire, hold, clear, grade or otherwise prepare land for community improvement (Section 28 (3) of the *Planning Act*);
- ii) Construct, repair, rehabilitate or improve buildings on land acquired or held by it in conformity with the community improvement plan (Section 28 (6));
- iii) Sell, lease, or otherwise dispose of any land and buildings acquired or held by it in conformity with the community improvement plan (Section 28 (6)); and
- iv) Make grants or loans, in conformity with the community improvement plan, to registered owners, assessed owners and tenants of land and buildings within the community improvement project area, and to any person to whom such an owner or tenant has assigned the right to receive a grant or loan, to pay for the whole or any part of the eligible costs of the community improvement plan (Section 28 (7)).

Section 28 (7.1) of the *Planning Act* specifies that the eligible costs of a community improvement plan for the purposes of Subsection 28 (7) may include costs related to environmental site assessment, environmental remediation, development, redevelopment, construction and reconstruction of lands and

buildings for rehabilitation purposes or for the provision of energy efficient uses, buildings, structures, works, improvements or facilities.

Section 28 (7.3) of the *Planning Act* specifies that the total of all grants and loans made in respect of particular lands and buildings under Section 28 (7) and (7.2) of the *Planning Act* and tax assistance provided under Section 365.1 of the *Municipal Act, 2001* in respect of the land and buildings shall not exceed the eligible cost of the community improvement plan with respect to those lands and buildings.

Section 28(11) of the *Planning Act* allows a municipality to register an agreement concerning a grant or loan made under subsection 28(7) or an agreement entered into under subsection 28(10) against the land to which it applies and the municipality shall be entitled to enforce the provisions thereof against any party to the agreement and, subject to the provisions of the *Registry Act* and the *Land Titles Act*, against any and all subsequent owners or tenants of the land.

Section 69 of the *Planning Act* allows municipalities to reduce or waive the amount of a fee in respect of a planning application where it feels payment is unreasonable. Municipalities can use this tool to waive all matter of planning application fees to promote community improvement without inclusion in a CIP. Alternatively, a municipality can collect fees and then provide a partial or total rebate of fees in the form of a grant, but this must be done within a CIP.

2.3 Ontario Heritage Act

The purpose of the *Ontario Heritage Act* is to give municipalities and the provincial government powers to conserve, protect and preserve heritage buildings and archaeological sites in Ontario. While the heritage property tax relief program under Section 365.2 (1) of the *Municipal Act, 2001* is designed to assist property owners in maintaining and conserving heritage properties, Section 39 (1) of the *Ontario Heritage Act* allows the council of a municipality to make grants or loans (up-front or tax-increment basis) to owners of designated heritage properties to pay for all or part of the cost of alteration of such designated property on such terms and conditions as the council may prescribe. In order to provide these grants and loans, the municipality must pass a by-law providing for the grant or loan.

Grants and loans for heritage restoration and improvement can also be provided under a CIP. One of the key administrative advantages of Section 39 of the *Ontario Heritage Act* is that it requires only passing of a by-law by the local council rather than the formal public meeting process under Section 17 of the *Planning Act* required for a CIP. One of the disadvantages of the *Ontario Heritage Act* is that unlike the *Planning Act*, it does not allow municipalities to make grants or loans to assignees, e.g., tenants who may wish to undertake heritage improvements.

Another aspect of the *Ontario Heritage Act* is that interpretation of Section 39 (1) of the *Heritage Act* suggests that this section does not restrict grants and loans only to heritage features. Section 39 (1) of the *Ontario Heritage Act* refers to "...paying for the whole or any part of the cost of alteration of such designated property on such terms and conditions as the council may prescribe." Consultations with

provincial staff and legal experts have confirmed that this section of the Act does not restrict grants and loans only to heritage features.

Section 39 (1) of the *Ontario Heritage Act* can also be used to provide grants and loans for the undertaking of professional design studies as these can be considered “part of the cost of alteration”. A design study is certainly an important precursor to, and key component of, any major heritage feature alteration. Section 39 (2) of the *Ontario Heritage Act* allows the council of a municipality to add the amount of any loan (including interest) to the tax roll and collect said loan in the same way that taxes are collected, for a period of up to 5 years. This section of the Act also allows the municipality to register the loan as a lien or charge against the land.

2.4 Development Charges Act

Section 5 of the *Development Charges Act* allows a municipality to exempt a type(s) of development from a development charge, but any resulting shortfall cannot be made up through higher development charges for other types of development. This allows upper and lower tier municipalities to offer partial or total exemption from municipal development charges in order to promote community improvement such as downtown redevelopment and/or brownfield redevelopment. Because this financial incentive is normally offered before construction, i.e., at the time of building permit issuance, it is a very powerful community improvement tool.

3.0 POLICY BACKGROUND

This section of the report reviews the key Provincial and City policies, plans and reports that are relevant to the CIP.

3.1 Provincial Policy Statement, 2014

The Provincial Policy Statement (PPS) is issued under Section 3 of the *Planning Act* and provides direction on matters of provincial significance related to land use planning and development. Section 3 of the *Planning Act* requires that, “decisions affecting planning matters shall be consistent with policy statements issued under the Act”.

The Province of Ontario released the latest version of the PPS on February 24, 2014 and the policies took effect on April 30, 2014. The vision for land use planning in Ontario in the PPS states that “the long-term prosperity and social well-being of Ontarians depends on planning for strong sustainable communities for people of all ages, a clean and healthy environment, and a strong competitive economy”. To this end, the PPS promotes:

- Efficient development and land use patterns, appropriate mixes of different land use types, cost-effective development patterns and standards, environmentally sensitive development practices, accessible neighbourhoods, and available infrastructure and public facilities (Section 1.1.1);
- Opportunities for intensification and redevelopment where this can be accommodated taking into account existing building stock or areas, including brownfield sites, and the availability of suitable existing or planned infrastructure and public service facilities required to accommodate projected need (Section 1.1.3.3);
- An appropriate range of housing types and densities that accommodate current and future users, that efficiently use the land, services and facilities, and that support alternative transportation modes to the automobile, such as public transit (Section 1.4.3);
- Healthy, active communities with streets, parks, public spaces and trails that are pedestrian and cyclist-friendly and contain a range of different recreation opportunities (Section 1.5.1);
- Long-term prosperity through the maintenance and enhancement of downtown and mainstreets (Section 1.7.1c);
- Encouraging a sense of place, by promoting well-designed built form and cultural planning, and by conserving features that help define character, including built heritage resources and cultural heritage landscapes (Section 1.7.1 d);
- Sustainable tourism development (Section 1.7.1 g); and
- Conservation of significant built heritage and cultural heritage resources (Section 2.6.1).

3.2 Growth Plan for the Greater Golden Horseshoe

The Growth Plan for the Greater Golden Horseshoe (“Growth Plan”), released in 2006, is the Province of Ontario’s growth strategy for the Greater Golden Horseshoe region, which was completed under the “Places to Grow” initiative, including the Places to Grow Act, 2005. The Growth Plan is identified as “a framework for implementing the Government of Ontario’s vision for building stronger, more prosperous

communities by managing growth in the region to 2031". The City of Orillia is included within the Growth Plan's area.

The Growth Plan provides an overall growth strategy that complements the PPS and is implemented primarily by municipal planning documents and other municipal tools. The Growth Plan seeks to building vibrant and compact communities that protect and enhance natural resources, support a strong and competitive economy, and optimize the use of new and existing infrastructure.

The City of Orillia is identified as a Primary Settlement Area in the Growth Plan. Section 6.3.1.2 of the Growth Plan notes that Municipalities with primary settlement areas will, in their official plans and other supporting documents:

- a) identify primary settlement areas;
- b) identify and plan for intensification areas within primary settlement areas;
- c) plan to create complete communities within primary settlement areas; and,
- d) ensure the development of high quality urban form and public open spaces within primary settlement areas through site design and urban design standards that create attractive and vibrant places that support walking and cycling for everyday activities and are transit-supportive.

Downtown Orillia is within the delineated "Built-up Area" in the Growth Plan which permits urban development. The Growth Plan in respect to land within the Built-up Area boundary generally promotes:

- Building "compact, vibrant and complete communities" (Section 1.2.2);
- Building complete communities with a diverse mix of land use types, a mix of housing and employment opportunities, and high quality open spaces (Section 2.2.2g);
- The development of a multi-modal transportation system that offers connectivity, efficiency, accessibility, and choice (Section 3.3.2.1);
- The planning of high density residential and employment uses to support public transit planning (Section 3.2.3a);
- The creation of pedestrian and cyclist-friendly environments in new communities, which are linked to other neighbourhoods and destinations (Section 3.2.4);
- The creation of a connected open space system (Section 4.2.1.4);
- The use of land use patterns and urban design standards that facilitate energy efficiency (Section 4.2.4.1b); and
- The conservation of built and cultural heritage resources as the built up area intensifies (Section 4.2.4.1e).

The Growth Plan requires that at least 40% of all new residential growth in the Greater Golden Horseshoe by 2015, and annually thereafter, is to be through intensification within the Built-up Areas within the Greater Golden Horseshoe, which includes the Project Area.

3.3 Strategic Plan

The City of Orillia adopted a strategic plan in December of 2011. The vision for Orillia in this plan is as healthy progressive community that respects people and promotes growth in a sustainable environment. This Plan identified seven strategic priority initiatives for the City to focus on. One of these strategic priorities is the Downtown and Waterfront and this focus led to preparation of the DTP and this CIP.

3.4 Economic Development Strategy

The City's Economic Development Strategy (EDS) was prepared in 2008. This Strategy identifies revitalization of the Downtown and Waterfront as a key opportunity for the City. The Downtown was cited as one of the key quality of life elements in the Strategy. However, the lack of progress on waterfront redevelopment was cited as one of the weaknesses that may be constraining Orillia. Revitalization of the Downtown was consistently cited as one of the key opportunities to stimulate economic development in Orillia during consultations for the EDS.

The EDS identifies five high level goals for the City of Orillia:

- 1) Capitalize on our Educational Assets;
- 2) Place and Emphasis on Lifestyle;
- 3) Target Strategic Growth;
- 4) Strengthen our Business Community;
- 5) Effective Marketing and Promotion.

This CIP will help achieve all of the above-noted goals, and especially goals 2 to 4. The EDS contains a number of recommendations to support economic development in the Downtown, including several recommendations that were subsequently included in the Downtown Tomorrow Plan. Of particular note, is Recommendation 3i of the EDS which encourages the development of a range of residential accommodation in the downtown and waterfront area, including higher density and medium density residential.

3.5 Official Plan

The City's Official Plan (OP) sets out the objectives and policies that guide land use and the short and long-term physical development of all lands within Orillia. Orillia City Council adopted the Official Plan on March 9, 2010. The OP was approved by the Ministry of Municipal Affairs and Housing with modifications in 2011, and appeals to the Plan were resolved by the Ontario Municipal Board in 2013.

The OP contains a number of policies that are relevant to preparation of the Downtown Tomorrow CIP. These include general, land use and design policies for the Downtown Area, and a number of other policies applicable to the Downtown such as heritage, brownfield redevelopment and community improvement policies. These policies are summarized below.

3.5.1 The Downtown Area

3.5.1.1 General Downtown Area Policies and Intent

The Vision in the OP seeks to guide future growth and development in Orillia in a manner that creates a complete community. The focus of this Vision is on a vibrant downtown, housing choices, green spaces, inspiring urban design and a strong and competitive economy.

Much of the Downtown study area is covered by the “Downtown Area” designation as per Schedule A of the OP. Within the Downtown Area, there are several distinct districts that have emerged over time to reflect the historic development pattern. These districts are identified on Schedule B of the OP as:

- i) Historic Main District;
- ii) Downtown Shoulder;
- iii) Hospital District; and,
- iv) Central Core Intensification Area.

The intent for the Downtown Area in the OP is that:

- it remain the administrative and cultural hub of Orillia;
- the character and viability of the historic Main Street is protected and enhanced;
- new development is compatible with existing development;
- new programs, planning and/or financial mechanisms will help ensure more urban lifestyle choices and a high standard of urban design while reducing the costs of new forms of development.

This CIP will certainly help to accomplish these goals.

The General Downtown Area policies encourage a mix of land use, housing and building types in the Downtown. It is the intent of the OP that built form will be the key determining factor for the types of development permitted in each land use designation. All the land use designations below require that development be compatible with existing development in the designation and with development in abutting designations.

3.5.1.2 Historic Main Street Designation

The Historic Main Street designation promotes the economic revitalization of Mississauga Street within a context of historic preservation, while recognizing that adaptive reuse, moderate development and intensification can be accommodated. High activity uses that animate the streetscape, like retail and restaurants, are encouraged at-grade, with uses such as offices and residential uses on second floors and above. Within the Historic Main Street designation, the minimum building height is 2 storeys and the maximum building height is 4 storeys. All development in the Historic Main Street shall be carried out in conformity with the “Design Policies for the Downtown Area”, and other applicable policies of the OP.

3.5.1.3 Downtown Shoulder Designation

The Downtown Shoulder area is a transition area between the Historic Main Street and existing and planned development in the “Stable Neighbourhood” and “Hospital District” designations. A mixture of uses is encouraged within the Downtown Shoulder and even on individual development sites within this area. The minimum building height is 2 storeys and the maximum building height is 4 storeys.

3.5.1.4 Hospital District Designation

The Hospital District, which includes the Orillia Soldiers' Memorial Hospital, is intended to provide opportunity for medical and hospital related uses services while ensuring that new development does not impact on the residential character of surrounding neighbourhoods. Building heights are limited to 8 storeys on the Hospital Lands and 4 storeys in the areas surrounding the Hospital Lands, although a height bonus in the areas surrounding the Hospital Lands to 6 storeys may be provided in exchange for community benefits, subject to Section 37 of the Planning Act.

3.5.1.5 Central Core Intensification Area

A large part of the Downtown study area is covered by the Central Core Intensification Area designation, which includes the Barrie Road and King Street/Atherley Road Corridors. The intent for this area is the promotion of significant development and intensification. A mixture of uses, including high activity uses that animate the streetscape and encourage foot traffic, like retail uses, are encouraged at-grade, with uses such as offices and residential uses on second floors and above. Maximum building height in this area is 4 storeys but a height bonus of up to 6, 8 or even 12 storeys may be provided in exchange for community benefits, subject to Section 37 of the Planning Act.

3.5.1.6 Design Policies for the Downtown

The urban design policies provide direction on design matters including street design (plantings and finishes), building design (form and articulation), and site design (parking, loading, landscaping). The design policies for the Downtown Area that are most relevant to this CIP promote:

- i) a full range of retail and community services and facilities in proximity to housing;
- ii) an attractive and distinctive Downtown with strong visual and physical connections to the Waterfront;
- iii) compatible building height, massing, design, landscaping and streetscape elements;
- iv) development that is compatible with the area's architectural styles, building materials and scale;
- v) articulated elevations along roads, particularly facing Lake Couchiching, and avoiding large, blank facades;
- vi) enhanced building elevations on prominent sites;
- vii) building design with ground floors featuring windows and doors;
- viii) pedestrian scale buildings with pedestrian weather and sun protection systems;
- ix) buildings with barrier free accessibility;
- x) dynamic building facades with architectural details and articulation;
- xi) building design that incorporates energy and resource efficiency and sustainable development;
- xii) preservation of heritage buildings; and,
- xiii) pedestrian realm, signage and lighting that promotes pedestrian comfort and safety.

3.5.1.7 Implementation

The Implementation section (3.2.8.9) of the Downtown Area policies notes that one of the implementation mechanisms for these policies of the OP is the preparation of a CIP or a series of CIPs in order to establish a vision for the Downtown area, identify public realm improvement priorities and establish incentive programs to assist the private sector in improving their properties.

3.5.2 Brownfield Redevelopment

Section 7.1.14 of the OP contains policies regarding brownfield redevelopment. This section of the OP indicates that the City will promote and encourage brownfield redevelopment, and that the City may consider using tools such as community improvement and height bonusing to do so.

3.5.3 Community Improvement

The City of Orillia recently adopted an Official Plan Amendment (OPA No.3) that introduced updated comprehensive Community Improvement policies into the Official Plan. These new community improvement policies (Section 7.4 of the OP) are attached as **Appendix A**. Section 7.4 of the OP provides considerable detail and ensures that the City can implement a range of incentive programs, policies and municipal actions as part of any CIP. A summary description of Section 7.4 of the OP is provided below.

Sections 7.4.1 a) to c) set out the intent of the community improvement policies in the OP, i.e., to provide a comprehensive framework for the designation of community improvement project areas and the preparation, adoption and implementation of community improvement plans by the City that promote the maintenance, rehabilitation, redevelopment and revitalization of the physical, social and economic environment in the municipality. As well, this section of the OP indicates that the City will consult with the community, business and residents during preparation of a CIP.

Section 7.4.2 a) sets out a number of general goals for community improvement and virtually all of these goals apply to the Downtown. Section 7.4.3 a) sets out numerous objectives for which the City may prepare and adopt CIPs. Again, virtually all of these objectives apply to Downtown Orillia. In fact, several of the policies in this section specifically reference Downtown Orillia in relation to:

- encouraging the preservation and enhancement of existing commercial areas through the stimulation of private sector investment, especially in Downtown Orillia;
- maintaining and improving the physical and aesthetic qualities and amenities of streetscapes, especially in Downtown Orillia; and,
- maintaining and improving the transportation network to ensure adequate traffic flow, pedestrian circulation and parking facilities, especially in Downtown Orillia.

Section 7.4.4 b) sets out criteria that must be present for designation of a community improvement project area, with the requirement that at least one, and preferably more than one of the specified criteria be satisfied. Downtown Orillia satisfies many of these criteria for designation of a community improvement project area, and it is this very reason that has led to designation of the Downtown as a community improvement project area and preparation of this CIP. In fact, Section 7.4.4 h) i) specifies that Downtown

Orillia is a priority for designation of a community improvement project area and preparation and adoption of a CIP.

Section 7.4.4 i) sets out the priority for phasing of community improvements while Section 7.4.5 a) specifies the actions that the City may take to implement an adopted and approved CIP. This includes the full range of actions permitted under Section 28 of the *Planning Act*, including the provision of grants and loans and the municipal acquisition of land and/or buildings.

Section 7.4.5 b) notes that all developments participating in CIP programs shall conform with the policies of the OP, the Zoning By-law, Property Standards By-law, and all other related municipal policies and by-laws. Finally, Section 7.4.5 c) notes that Council shall adopt such special measures as may be necessary to implement the goals and objectives for community improvement.

In summary, the Community Improvement policies in the OP provide a sound and comprehensive foundation and very strong support for preparation of this CIP.

3.6 Zoning By-law

The City of Orillia's current Zoning By-law is Zoning By-law 2014-44 was approved by the Ontario Municipal Board in 2014. The Zoning By-law implements the OP policies by regulating the use of land within the City, including permitted land uses, building location and form, and parking requirements, among other considerations. The study area is truly mixed and varied in terms of the applicable zoning. Generally, the core area along Mississauga Street is principally commercially zoned while the surrounding areas are a mixture of commercial, residential, open space, institutional, and industrial zones. In respect to the commercial zones, notable regulations implementing the OP design direction for Downtown include those concerning minimum and maximum front yard setbacks, minimum and maximum building heights, and permissions for a mixture of residential and commercial uses. Additionally, the majority of the study area is covered by a Downtown Area Overlay which provides additional specific regulations in addition to the underlying zone (such as reduced minimum and maximum front yard setbacks).

3.7 Sign By-law

The City of Orillia Sign By-law (Chapter 832) regulates the design and placement of signs throughout the City. It is principally concerned with regulating the type, location, size and permitting of signs on private properties within the City. The Sign By-law permits a broad range of sign types, which are typically found in most commercial areas, throughout the study area. This includes wall signs, billboard signs, ground signs, projecting signs, and pole signs, as well as other types. Schedule A of the Sign By-law identifies a defined Downtown Sign Permit Area that generally is bounded by Centennial Drive to the east, Albert Street to the west, Colborne Street East to the south, and Coldwater Street/Neywash Street to the north, and covers the central portion of the study area. The Downtown Sign Permit Area adds further regulations concerning additional prohibited or exempted types of signs, the character and appearance of signs (a Victorian character), the number of signs, and the evaluation and permitting process for signs.

3.8 Downtown Tomorrow Plan

The “Downtown Tomorrow, Linking Orillia’s Core to the Water” report, known as the “Downtown Tomorrow Plan” (DTP) was presented to Council in September of 2012. This Plan sets out a long-term vision and comprehensive plan for revitalization of the Downtown and Waterfront. Preparation of the DTP involved an extensive consultation process that included interviews with key stakeholders, a four day design charrette and a public open house.

The DTP identifies a long-term vision for Downtown Orillia that is:

- accessible and inviting;
- vibrant and creative;
- healthy and livable; and,
- green and beautiful.

This vision targets the Downtown for intensification and sees thousands more people living in Downtown Orillia. These people will be accommodated in higher density housing including the conversion of vacant and underutilized space on the upper floors of existing commercial buildings and new high density residential infill and redevelopment. Former industrial sites will have been transformed for new residential and mixed uses with a range of housing options and affordability. The Waterfront will showcase residential and commercial development and be much better connected to the Downtown Core. The Downtown will offer live/work opportunities, new and unique retail uses, restaurants that create a hub of activity day and night. Finally, all new development in the Downtown will be well designed and will respect Orillia’s historic character. In order to help ensure this, the DTP includes guidelines for public and private realm development.

The DTP includes goals and a strategy to help achieve the long-term vision. The goals of the DTP are to:

- 1) Increase the residential population Downtown;
- 2) Reinforce Downtown as a civic and institutional hub;
- 3) Celebrate Downtown’s cultural heritage and activity;
- 4) Enhance the shopping and dining experience Downtown;
- 5) Improve connectivity and streetscapes Downtown;
- 6) Create new spaces Downtown for playing, gathering and relaxing;
- 7) Promote Orillia and enhance the visitor experience.

The Strategy includes 33 recommended initiatives to be pursued over the next 20 years to help achieve the vision and goals for the Downtown. The 33 recommended initiatives are grouped under each of the goals, and the DTP also includes a list of 15 short-term priority actions that the City should pursue. Chief among those actions is the recommendation that the City prepare a CIP that includes a range of development incentives (DTP strategies 1, 2, 3 and 13). This CIP builds directly on the vision and goals identified in the DTP and represents a key implementation tool to help achieve the vision and goals of the DTP. The connection between the DTP and the CIP is further explored in section 9.0 of this Plan.

3.9 Heritage Conservation District Study

The idea of designating Historic Downtown Orillia as a Heritage Conservation District (HCD) was included in the City's Cultural Plan prepared in 2005. A HCD Study was prepared in 2010. This study focused on the Downtown Core, describing the area's heritage character and proposing both a rationale for designation and a district boundary. The Study notes that Downtown Orillia contains a concentration of high quality 19th century commercial buildings with several designated properties and a number of other historical properties included on the City's Register. The HCD Study recommended that the Historic Main Street Area in the Official Plan be designated as a Heritage Conservation District.

3.10 Existing Community Improvement Plans and Incentive Programs

The City of Orillia has designated three community improvement project areas and adopted two community plans. The designated community improvement project areas are shown in **Figure 2** and listed below, including their date of designation:

- i) Downtown Core Community Improvement Project Area (November 4, 1996);
- ii) Barrie Road Corridor (May 12, 2003); and,
- iii) King Street Atherley Road Corridor (May 12, 2003).

The Downtown Core Community Improvement Plan was adopted and approved on November 4, 1996 and includes a Façade Improvement Program. This program is managed by the Downtown Orillia Management Board and is available only to properties within the Downtown BIA. The Façade Improvement Program includes two types of grants. Under the Façade Improvement Grant Program, applicants are eligible to apply for a grant equal to 50% of the cost of façade improvement works to a maximum grant of \$5,000. Under the Heritage Signboard Grant, applicants are eligible to apply for 40% of the cost of creating a heritage signboard to a maximum grant of \$1,000.

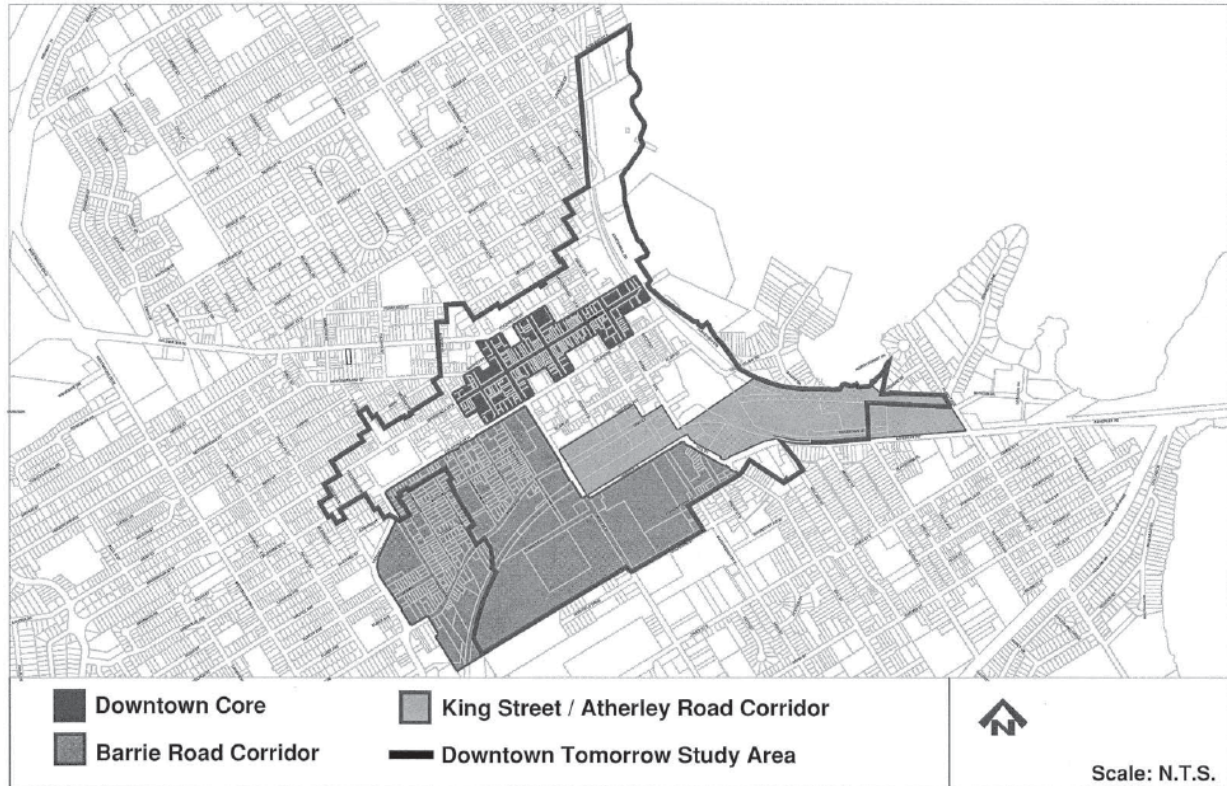
The City of Orillia makes annual contributions to the program budget for the Downtown Façade Improvement Program. A review of the annual budget and number of applications approved under the Façade Improvement Program indicates that while the program has been used to good effect in the Downtown BIA, uptake of the program has dropped off in recent years and the maximum grant amount available under the program is modest when compared to the cost of façade improvement, especially on designated heritage buildings.

The Barrie Road Corridor CIP was adopted on October 27, 2003 and amended in October of 2005. This CIP was designed to help promote the redevelopment of brownfields in the Barrie Road Corridor and contains one incentive program, the Property Improvement Tax Grant Program. This program is a tax increment grant program that would provide an annual grant equal to up to 100% of the City property tax increase generated by the redevelopment project for up to 10 years. However, no applications for the Property Improvement Tax Grant Program were ever approved by the City.

A CIP was never prepared for the King Street Atherley Road Corridor.

The three existing community improvement project areas and two existing community improvement plans will be repealed and replaced by the Orillia Downtown Tomorrow Community Improvement Plan.

Figure 2 Existing Community Improvement Project Areas



3.11 Downtown Orillia Management Board Strategic Plan

The Downtown Orillia Management Board adopted a strategic plan in 2009. This strategic plan contains a number of recommendations that will be directly or indirectly supported and implemented by this CIP, including:

- Improve aesthetics in the Downtown;
- Create a more pedestrian friendly Downtown;
- Improve business recruitment strategies; and,
- Encourage merchants to extend operating hours and provide consistent operating hours.

The Downtown Orillia Management Board is a key stakeholder and will play an important role in helping the City to implement and market the programs contained in this CIP.

4.0 CONSULTATION

Preparation of the CIP was guided by and benefitted greatly from an extensive program of stakeholder and public consultation. This included consultation with the Project Review Team, senior City staff, Council and members of the public as described below.

4.1 Project Review Team

A Project Review Team (PRT) was formed to help guide preparation of the CIP. The PRT is comprised of senior City staff, representatives of the Downtown Orillia Management Board and other business representatives in the study area. Several in person and conference call meetings of the PRT were held throughout preparation of the CIP. The purpose of these meetings was to:

- Provide the PRT with progress updates;
- Discuss and obtain input on the most significant community improvement needs;
- Discuss and obtain input on the proposed financial incentive programs; and,
- Coordinate public meetings and other steps required to complete the CIP.

4.2 Interviews

In July of 2015, the project consultant conducted one-on-one interviews with the Mayor, members of City Council and senior City staff members including the CAO and Chief Financial Officer. The questions asked during these interviews focused on the key impediments to downtown revitalization in Orillia, the most important needs and types of community improvement in the Downtown, and potential programs and actions that would help to achieve the desired type of community improvement.

4.3 Public Information Sessions and Workshops

4.3.1 Public Information Session and Workshop No.1

The first Public Information Session and Workshop was held on July 14, 2015. The purpose of this session was to:

- a) Provide the community with an introduction and overview of the process of preparing a CIP and the benefits of CIPs;
- b) Present and receive input on the critical community improvement needs and desirable types of community improvement throughout the study area; and,
- c) Explore ideas to promote community improvement in the study area.

Approximately 50 people attended the first Public Information Session. Attendees included business and property owners, residents, members of City Council and other interested parties. Almost all attendees stayed for the Workshop session where the attendees were divided into five (5) working groups and asked to discuss and answer the following questions:

- 1) What are the most important community improvement needs in Downtown Orillia?

- 2) What are the most significant opportunities for and types of community improvement in Downtown Orillia?
- 3) What types of financial incentives do you think would work best and be most utilized in Downtown Orillia? and,
- 4) Do you have any other key ideas or suggestions for community improvement in Downtown Orillia?

Attendees were also provided with a comment sheet and invited to provide written comments.

A summary of the responses from the working groups is provided in **Appendix B**. The working group comments along with comments received from the PRT, Council and senior City staff were utilized by the consultant to finalize the community improvement needs analysis contained in the next section and to develop preliminary incentive programs and design principles and guidelines which would be subject to input during the second public information session and workshop.

4.3.2 Public Information Session and Workshop No.2

A second Public Information Session and Workshop was held on October 27, 2015 to:

- a) Provide a project update;
- b) Present the recommended Community Improvement Project Area;
- c) Present the Draft Design Principles and Guidelines;
- d) Present the Draft Incentive Programs being considered for inclusion in the CIP; and,
- e) Explore the connection between the DTP and the programs being proposed for inclusion in the CIP.

Approximately 15 people attended the second Public Information Session. Attendees included business and property owners and residents. Most of those in attendance stayed for the Workshop session where the attendees were divided into (2) two working groups and asked to discuss and answer the following questions:

- 1) Do you have any comments on the Design Principles and Guidelines?
- 2) Which of the proposed incentive programs do you think are most important?
- 3) What changes or additions to the proposed incentive programs would you like to see?
- 4) Do you have any other key ideas, suggestions or comments regarding community improvement in Downtown Orillia?

A summary of the responses from the working groups to these questions is provided in **Appendix C**. Attendees were also invited to provide written comments and one comment sheet was received and forwarded to the consultant for reviews.

4.4 Council Workshop Session

On September 21, 2015, prior to the second public information session and workshop, a staff report was forwarded to Council to provide an update on the CIP project. After the second public information session and workshop on October 27, 2015, Council held their own workshop on November 12, 2015 to receive an update on the results of the second public information session and workshop and to discuss and provide input on the Draft Design Principles and Guidelines, Draft Incentive Programs, and the marketing and implementation of the CIP programs.

In summary, the comments and input obtained from all of the various sources of stakeholder and public consultation described above were reviewed and used to prepare this CIP, including the community improvement needs analysis, and the design principles and guidelines, incentive programs, and implementation strategy.

4.5 Project Website

The City of Orillia established a CIP project website to provide updates on the progress of the Downtown Tomorrow CIP (see <http://www.orillia.ca/downtowncip>). This website includes information on CIPs, news releases, public notices, and consultation summaries from the public information sessions, and update reports to Council.

5.0 COMMUNITY IMPROVEMENT NEEDS

5.1 Purpose

An analysis of the critical community improvement needs was undertaken to gain an understanding of the key issues in Downtown Orillia and the important community improvement needs that should be addressed by this CIP. As such, the community improvement needs analysis contained herein provides a key foundation for the preparation of this CIP, including the incentive programs recommended in the CIP.

5.2 Methodology

The analysis of community improvement needs started by identifying key challenges and community improvement needs in the study area based on a review of relevant planning and policy documents, especially the observations and planning direction contained in the DTP. Aerial photographs of the study area were examined and two driving and walking tours of the study area were conducted in June of 2015. During these walking tours, approximately 150 photographs were taken across the study area. A “community improvement lens” was applied to the area with observations and notes being made with respect to the key aspects of land use, building and property conditions, design and heritage elements and business activity requiring community improvement in the study area. For purposes of this community improvement needs analysis, the study area was divided into four sub-areas: Downtown Core, Waterfront, Hospital District, and the Barrie Road/King Street/Atherley Road Corridor.

The information obtained from the planning and policy review and the study area tours was then used to identify the key challenges and preliminary community improvement needs for Downtown Orillia. When examining the entire study area, one of the key challenges that emerges is that the area is quite large, with a broad range and mix of land uses. The area also presents a number of different community improvement challenges and opportunities, ranging from utilization of underutilized upper stories in existing mixed use buildings, especially in the Downtown Core, to large scale infill and redevelopment opportunities on the Waterfront and in the Barrie Road/King Street/Atherley Road Corridor. Therefore, it is important that the programs included in this CIP, as a group, address these various community improvement needs.

Results of the community improvement needs analysis were presented to the PRT at the first Public Information Session and Workshop held on July 14, 2015. Comments received from the PRT and from attendees at the Workshop were then used to augment and finalize the community improvement needs described below.

5.3 Community Improvement Needs

5.3.1 Downtown Core

The historical Downtown Core, centered on Mississauga Street, is a traditional Ontario main street that is compact and walkable. The Downtown Core contains a diverse and interesting mix of independent retail shops, restaurants and services. The street itself plays host to a number of festivals and events throughout the year. The Downtown Core also contains a number of civic, institutional and cultural anchors which draw

people to the Downtown, including the new library, opera house, downtown campus of Lakehead University, and City Hall. The Downtown Core is surrounded to the north and west by attractive and stable residential neighbourhoods, to the east by the Waterfront and to the south by the Barrie Road/King Street/Atherley Road Corridor.

A number of the building facades along Mississauga Street and Peter Street have been restored and improved and are considered to be in good to excellent condition. However, there are also a number of buildings and building facades along Mississauga Street, as well as Coldwater and Colborne Streets, that are in fair to poor condition. Key areas of concern with respect to these buildings include the condition of front, side and rear facades, the quality and consistency of business signage, interior building conditions, and the condition of windows, roofs, doors, and building entrances. In particular, the side facades of some prominently visible corner buildings on Mississauga Street are in poor condition. Building and façade conditions along Mississauga Street were found to generally deteriorate towards both the eastern and western ends of the core. There are also a considerable number of quality heritage buildings on and near Mississauga Street. A number of these buildings have been preserved and restored. However, a number of these buildings still require heritage restoration and improvement.

Finally, there are several vacant buildings, commercial units and storefronts in the Downtown Core. A number of these vacancies are prominently located at or near key intersections along Mississauga Street, potentially giving the general impression that business vacancy rates in the Downtown Core are higher than they actually are.

There are also a number of opportunities for community improvement in the Downtown Core. For example, based on a “window survey” from the street below, it appears that the upper storeys of two and three storey mixed use buildings along Mississauga Street, and secondary streets such as Coldwater, Colborne, and Peter Streets are underutilized. These upper stories could potentially be converted to residential apartments, live/work space, commercial/office space, or cultural space, thereby adding an enhanced customer base and more vibrancy to the Downtown, including the sometimes forgotten secondary streets. The Downtown Core also contains a number of prominently located infill and redevelopment opportunities that could add a considerable number of residential units and commercial space to the Downtown.



5.3.2 Waterfront

There are a number of large vacant former industrial properties in the Waterfront area. Based on the former industrial use of these lands, some of these lands have the potential to be environmentally contaminated and will require remediation and/or risk assessment/risk management prior to redevelopment for residential, commercial and mixed use. Therefore, the costs to redevelop these lands may be significantly higher than the costs to redevelop other lands that are not environmentally impaired, and these lands may require additional incentivization. These vacant and underutilized properties on and near the Waterfront represent significant redevelopment opportunities that could introduce higher density residential uses, commercial uses and mixed uses on and near the Waterfront. In fact, these “catalytic projects” could have catalytic impacts and spur additional development on the Waterfront and throughout Downtown Orillia. As noted in the DTP, the redevelopment of these lands together with the extension of Coldwater Street and Colborne Street, will also be central to better connecting the Downtown Core and the rest of the study area to the Waterfront. The quality of the design, architecture, and building materials associated with redevelopment of the Waterfront will be very important.

It should also be noted that the rear facades and parking areas of some prominently visible commercial and mixed use buildings near the Waterfront are in poor condition. Furthermore, the redevelopment of the Waterfront will have to take into consideration the condition and compatibility of existing low density residential housing on the east side of Front Street that is generally in fair to poor condition. There are also a few industrial uses on and near Atherley Road at the eastern boundary of the study area that may present future opportunities to add to the Waterfront redevelopment lands.



5.3.3 Barrie Road/King Street Corridor

The southern part of the study area includes the Barrie Road Corridor in the west through the King Street Corridor in the central part and through to the Atherley Road Corridor in the eastern part of the study area. There are a number of large, vacant and underutilized former industrial properties in this corridor. Similar to properties in the Waterfront Area, some of the properties in the Barrie Road/King Street Corridor have the potential to be environmentally contaminated and will require remediation and/or risk assessment/risk management prior to redevelopment for residential, commercial and mixed use, but some of these properties also have the potential to host catalytic redevelopment projects that could spur additional beneficial development in this area.

In addition to the large number of vacant sites in this part of the study area, there are several older, vacant, obsolete and underutilized industrial and commercial buildings and units. A number of the commercial buildings in this part of the study area are in fair to poor condition with the facades, signage, building conditions, and property maintenance being particular areas of concern. Furthermore, some of the residential building stock in this part of the study area is also in poor condition.



5.3.4 Hospital District

The Hospital District is in the eastern part of the study area focused around Soldiers' Memorial Hospital. The condition of commercial and mixed use buildings along Colborne and Mississauga Streets in this part of the study area is generally fair to poor with several buildings exhibiting building condition and façade issues. While some of the former residential dwellings along Mississauga and Colborne Streets have been converted for medical related office use, there are a significant number of vacant commercial offices and a significant amount of vacant commercial space in this district. This area also contains some underutilized parking lots and vacant infill lots that could provide infill/redevelopment opportunities.



5.3.5 Priority Community Improvement Needs

The above noted analysis identified a number of different community improvement needs throughout the study area. While these needs vary in relevance and importance from area to area, there were a number of community improvement needs that were identified over and over again by the PRT and participants in the first public information session workshop. As well, these community improvement needs were identified as being of the highest priority to successful achievement of the vision for Downtown Orillia contained in the DTP. These priority community improvement needs for Downtown Orillia include the need:

- i) To have more people living Downtown in renovated and converted upper storey apartments that make use of vacant and underutilized space in upper storeys of commercial and mixed use buildings, and in new higher density residential buildings – this will help to activate and make the Downtown more vibrant;
- ii) To improve the condition and appearance of front, side and rear building facades, the quality and attractiveness of commercial signage, and storefronts/display areas;
- iii) To repair, renovate and improve the condition of commercial and mixed use building exteriors and interiors;
- iv) To maintain, preserve, restore and improve heritage buildings/properties;
- v) For new development and investment and investment in derelict and underutilized buildings and vacant infill sites all across the study area;
- vi) To remediate and redevelop large vacant former industrial properties in the Waterfront area and in the Barrie Road/King Street Corridor; and,
- vii) The need to promote “catalytic projects”, i.e., larger scale projects that are of a scale, type and design that will spur and attract additional complementary development to the area around them.

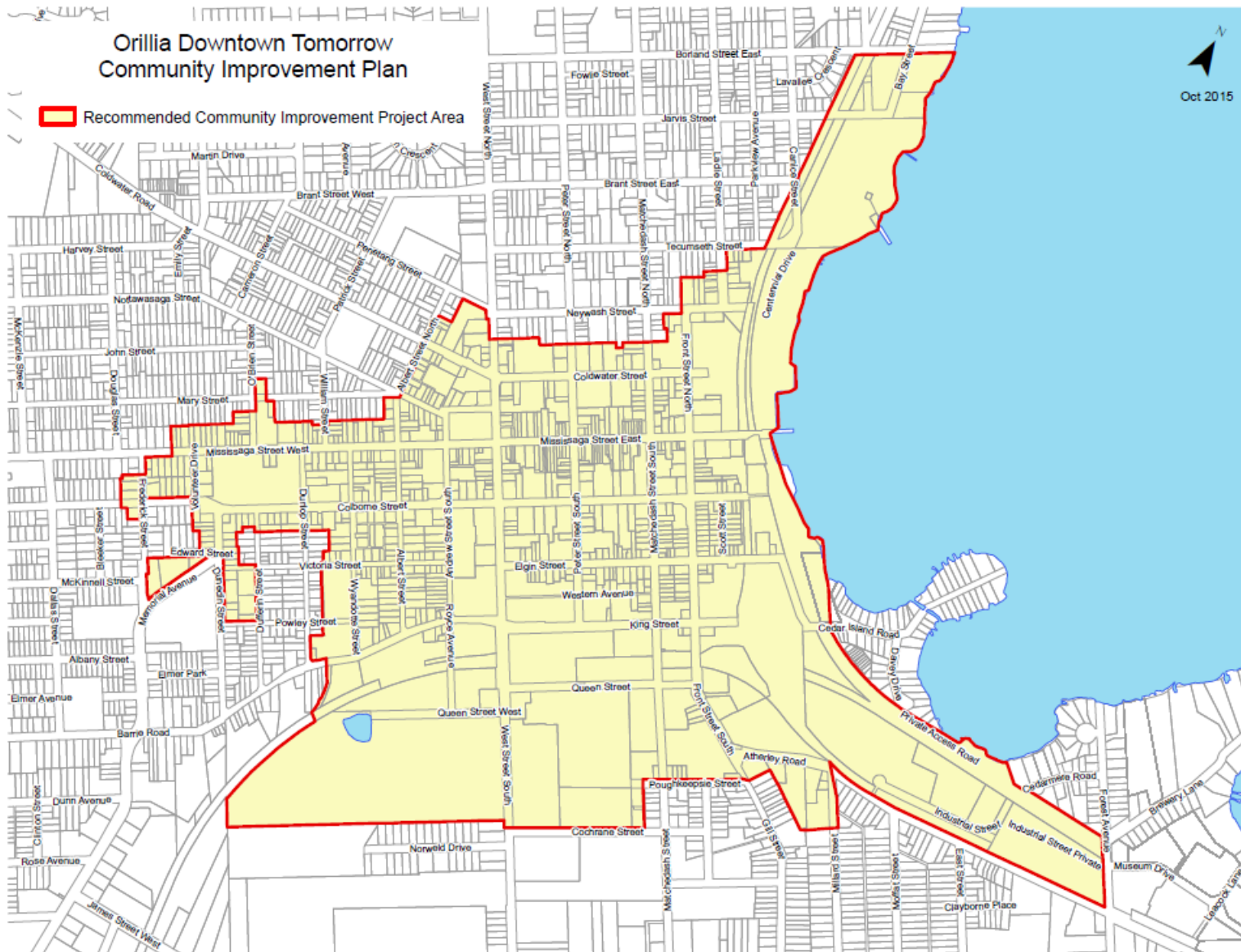
6.0 COMMUNITY IMPROVEMENT PROJECT AREA

In order to delineate a recommended Community Improvement Project Area for the CIP, the study area shown in Figure 1 and properties adjacent to the study area were examined to determine current land uses, official plan designation, and zoning. This was augmented by the community improvement needs analysis that examined building conditions, vacant and underutilized properties, and the potential for future conversion of non-commercial uses to commercial uses and the potential for rehabilitation/redevelopment of properties in the study area, including those near the boundaries of the study area.

For the most part, the study area was found to accurately encompass those properties most in need of community improvement. However, there are a few properties just outside the study area at the western boundary of the study area near Memorial Avenue, the northern boundary of the Waterfront area and the southern boundary along Atherley Road that were added to the study area to form the recommended “Recommended Community Improvement Project Area”. These properties were added because they are commercial, mixed use or industrial properties that require community improvement and/or have the potential for future conversion to commercial uses and/or future potential for residential or mixed use redevelopment.

The Community Improvement Project Area is the area where financial incentive programs will be offered. The Recommended Community Improvement Project Area (Project Area) for the Downtown Orillia Downtown Tomorrow CIP is shown in **Figure 3**. This Project Area is designated by a by-law passed by Council and the CIP will apply to the designated Community Improvement Project Area.

Figure 3 Community Improvement Project Area



7.0 DESIGN PRINCIPLES

7.1 Purpose

The Design Principles express the City's design expectations for the preparation and review of development proposals that apply for incentive programs offered within the Downtown Tomorrow Community Improvement Project Area. The overall purpose of the Design Principles is to facilitate high quality, well-designed projects that support the human scale and pedestrian-oriented vision for the Community Improvement Project Area. The Design Principles are meant to ensure any City investments in incentive programs for encouraging improvements and development by property owners achieves the expected design vision established for the Community Improvement Project Area.

7.2 Basis

The Design Principles were formulated based on the foundation set by the various design-related documents that inform planning and design within the Community Improvement Project Area. These include the general urban design policies of the City of Orillia Official Plan; the applicable built form regulations of Zoning By-law No. 2014-44; the private realm design guidelines of the DTP; direction in the Heritage Conservation District Study; and, the regulations of the Orillia Sign By-law. The Design Principles expand on this policy foundation by providing a more specific guidance tool for new developments and improvements to existing development in support of the CIP's incentive programs. The Design Principles reference some of the above-noted foundation documents where said documents provide direction and guidance, and the Design Principles then provide further complementary design guidance. If a Heritage Conservation District and associated Guidelines are approved by the City in the future, said Heritage Conservation District Guidelines would take precedence over the Design Principles and Guidelines contained herein for all parts of the Community Improvement Project Area covered by the Heritage Conservation District.

7.3 How to use the Design Principles

The following considerations set the framework for how the Design Principles are meant to be applied as part of the CIP:

1. They are meant to be used by property owners/developers and their design professionals when designing projects that will apply for financial incentive programs offered within the Downtown Tomorrow Community Improvement Project Area. However, the City may apply the Design Principles to all development proposals within the Downtown Tomorrow Community Improvement Project Area, whether or not application is being made for the incentive programs offered within the Downtown Tomorrow Community Improvement Project Area.
2. They are meant to be used by City staff when evaluating applications for financial incentive programs that may be offered within the Downtown Tomorrow Community Improvement Project Area, *and when reviewing applications for planning and development approvals within the Downtown Tomorrow Community Improvement Project Area (optional).*

3. They are meant to be a flexible guidance tool for design and development within the Community Improvement Project Area, and are not meant to be read as strictly as “policies” or “regulations”, so as to not restrict creativity in design.
4. They include both “principles” that are general in nature and are meant to be achieved for all projects; as well as suggested “guidelines” that are not meant as a checklist where every guideline is to be satisfied, depending on the situation.
5. They are meant to be applied on a case-by-case basis given they speak generally to a broad area that is made up of sub-areas with different characteristics.

7.4 Design Principles and Guidelines

Principle 1:	Existing heritage buildings restored to reveal their original character and features.	✓ Commercial Buildings ✓ Residential Buildings ✓ Mixed-Use Buildings
	Design Guidelines:	
	1. Existing buildings with defined heritage characteristics should be restored based on documented information and photographs for the building.	
	2. Restoration may include maintaining, restoring, revealing, uncovering, or sensitively replacing original building materials, finishes, colours, doors, windows, or other architectural features.	
	3. New elements or features should not be added to a restored façade if not documented as part of the original condition.	
	4. Where replacement of any features is required given their existing conditions, they should match the character and style of operation of the original feature.	
Principle 2:	New building styles complementary to the existing traditional building stock.	✓ Commercial Buildings ✓ Residential Buildings ✓ Mixed-Use Buildings
	Design Guidelines:	
	1. New buildings should be complementary additions to the existing building stock that take design references from existing quality examples of buildings within the area.	
	2. References to consider should include those concerning the building massing and scale, facade proportions and rhythm, and building materials, rather than particular architectural styles.	
	3. Complementary designs can either be achieved through a more traditional style that blends into the broader area or a more contemporary style that sets heritage buildings apart through a	

defined contrast.

4. A building's style and design should be consistent for all front and side and/or rear walls that are publicly visible.

Principle 3: New buildings situated close to the street providing an intimate and comfortable pedestrian environment.

Design Guidelines:

1. Where the City's Zoning By-law establishes minimum and maximum setbacks for properties, buildings should be set back as close as possible to the minimum in order to reinforce the street edge.
2. Where an appropriate setback range established by the immediately adjacent buildings exists, new buildings should be situated within that range.
3. Setback space should be used for landscaped areas, amenity areas, seating opportunities, or display areas, depending on the type of use.
4. Parking spaces should not be located in the front yard setback space, and preferably not in the exterior side yard space on corner lots.

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

Principle 4: New buildings situated along the width of a site to maximize the enclosure of the street.

Design Guidelines:

1. New buildings should be sited to maximize the use of the building frontage along the street between a site's side property lines, not including any frontage required for pedestrian connections or vehicle access points.
2. A target of at least 80% of a site frontage should be sought for new buildings, recognizing the width required for driveways or walkways depending on the nature of the site.
3. New buildings should generally be oriented parallel to the street edge so that they frame the street edge.
4. Buildings on corner sites should be angled at their corners facing the intersection for entrances located at those corners or where enhanced visibility around the building corner is desired.

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

Principle 5:	New buildings at least two storeys in height at the street line to efficiently use the land.	✓ Commercial Buildings
	Design Guidelines:	✓ Residential Buildings
	1. Two storeys provides the minimum height needed for the desired streetscape experience, although taller buildings are encouraged.	✓ Mixed-Use Buildings
	2. Maximum heights are guided by the direction of the Downtown Tomorrow Plan and depend on the specific district of Downtown as specified in that Plan.	
	3. Maximum heights generally range between 4 storeys in the “Downtown-at-the-Lake” precinct and 8 storeys (and potentially up to 12 storeys in certain situations) in the other five precincts.	
	4. Section 5.2 of Zoning By-law No. 2014-44 provides regulations concerning angular planes for building over 3 storeys in height in certain areas of the Community Improvement Project Area.	
Principle 6:	Taller ground floor heights accommodating a pedestrian scale and flexibility for non-residential activities.	✓ Commercial Buildings
	Design Guidelines:	✓ Mixed-Use Buildings
	1. New commercial and mixed-use buildings should include taller ground floors as compared to upper floors to reinforce the pedestrian scale of the street.	
	2. Ground floor heights of 4.0 to 4.5 metres of floor-to-floor height are an appropriate, although the pattern of existing buildings along the streetscape should also be considered.	
Principle 7:	Transparent ground floor façades with a large proportion of transparent wall surfaces that allow visibility.	✓ Commercial Buildings
	Design Guidelines:	✓ Mixed-Use Buildings
	1. Transparent wall surfaces includes transparent windows and entrance doors that provide visibility between the street and the interior of stores.	
	2. Glass that fully or partially prevents visibility should not be used on the ground floor.	
	3. Transparency of 50% to 80% on ground floor wall area in traditional main streets with narrower individual units is common	

and an appropriate target for such units.

4. Lower targets such as 20 to 40% for new buildings with individual units that are larger than traditional sizes is also appropriate provided they are supported by other architectural features that support a pedestrian environment.
5. Storefront windows should be supported by traditional architectural elements, including window bases, transom windows, and storefront cornices, as well as columns or piers that appear as “structural” elements for the upper storeys.
6. Transparency and visibility for rear facades that are publicly visible and accessible, as well as side facades that face publicly accessible laneways or walkways, should be also considered. Lower targets than the front façade may be appropriate recognizing their secondary nature and internal functional building considerations.

Principle 8: Restored/improved building entranceways providing barrier-free access to buildings.

Design Guidelines:

1. New buildings are regulated by the Ontario Building Code in respect to barrier-free access, and those requirements are to be referenced.
2. For renovated facades and storefronts, entrance thresholds should provide barrier-free accessibility when improvements to the building façade are made.
3. Improvements can be provided through structural changes to the thresholds (such as grinding of existing surface) or creative methods for access (such as removable ramps).
4. Door hardware should complement the original character and style of the façade while enabling barrier-free accessibility.

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

Principle 9: Awnings designed and located in a tradition fashion for commercial storefronts.

Design Guidelines:

1. Awnings above storefront windows and doors should be considered to provide weather protection, additional opportunities for building signage, sunlight control, and visual interest to the façade.

- ✓ Commercial Buildings
- ✓ Mixed-Use Buildings

2. Retractable awnings should be used to provide for seasonal use as needed.
3. Awnings should be a traditional square or triangular shape and should be fabric material rather than synthetic materials.
4. Awnings should span the façade's window and door openings only and not the entire façade. For multi-tenanted buildings, individual awnings for each units should be used rather than a single continuous awning.
5. Awnings should be mounted in the storefront portion of the façade and not covering architectural elements.

Principle 10: A palette of materials on new or restored building façades similar to the existing materials in the area.

Design Guidelines:

1. Materials selected should be high quality, durable, and easily maintained, complementary to one another, and appropriate for the building's architectural style.
2. An arrangement of one or two base materials together with accent materials should be considered.
3. Brick, stone, concrete, and non-coloured glass are the preferred base materials.
4. A more varied range of accent materials may be used, such as wood trim, copper, steel, or other metals.
5. Stucco, materials that mimic other materials, aluminum or sheet metals, other siding systems, or non-local stone materials should not be used as base or accent materials.
6. Materials selected and their use should be consistent for a building's front and side and/or rear walls that are publicly visible.

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

Principle 11: Colours displaying the individuality of the building and business while complementing the traditional building character.

Design Guidelines:

1. While there are no preferred colours, colours on building façades should be muted and soft, as compared to overly bold and saturated.

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

2. Colour patterns should have one or two base colours and supporting accent colours as warranted, in order to avoid “overcolouring” a building’s façade.
3. Accent colours should be focused on emphasizing architectural features such as window and door frames, building trim, signage and lettering, and other details.
4. Colours selected and their use should be consistent for a building’s front and side and/or rear walls that are publicly visible.

Principle 12: Commercial signage located and designed in a traditional fashion while still allowing for creativity of particular businesses.

✓ Commercial Buildings
✓ Mixed-Use Buildings

Design Guidelines:

1. While the City’s Sign By-law regulates permitted sign types and performance standards, fascia signs, hanging signs and/or window signs are the preferred types for existing or new buildings.
2. The core area of Downtown Orillia has specific regulations for sign types, character, and style; the guidelines below apply to areas outside of this regulated area.
3. Fascia signage should be installed in the horizontal section that divides the storefront windows from the upper façade, avoiding obscuring or covering windows, doors, entrances, and architectural features.
4. Hanging signs should be installed perpendicular to the façade and hang from a mounted wall brace, which are attractive, durable, and forms part of the overall sign design, either simple or more decorative.
5. Window signs should be etched or painted glass on the windows or signs that are attached to the glass or displayed directly behind it.
6. Durable, weatherproof materials that complement those of the building façade, should be used for all signs.
7. Internally lit, neon or plastic materials should not be used for any signs.
8. Lettering typefaces that are easy-to-read should be used, subject to any relevant provisions of the City’s Sign-By-law.

9. Lettering and images on signs should provide depth to the sign, such as raised lettering or individually cut or carved lettering.

Principle 13: Outdoor spaces with “spill-out” space from the business to help animate the street, while not impeding movement or hindering accessibility along the street.

Design Guidelines:

1. The space between buildings and the street sidewalk edge for existing or new building setbacks should accommodate “spill-out” spaces for abutting business, such as cafés or patios.
2. Cafés or patios should be designed and located to ensure they do not detract from the visual quality of the streetscape and do not impede movement for all users along the sidewalk.
3. The public sidewalk’s alignment should remain straight within the right-of-way, or alternatively, angled following the configuration of the bump-out along the street.
4. Railings or enclosures surrounding the space should complement the building’s design using materials that allow visibility to and from the space, and that can be easily removed and stored elsewhere during seasons when they are not in use.
5. For buildings set back from the sidewalk edge, the surface of the private property between the building face should be of a similar treatment and material as the public sidewalk

✓ Commercial Buildings
✓ Mixed-Use Buildings

Principle 14: Murals on building walls providing visual interest and enhancing the sense of community.

Design Guidelines:

1. Murals on the publicly visible side or rear walls of buildings should be considered to provide visual interest on otherwise featureless side or rear building walls.
2. Murals may be painted on a material that is then affixed to the wall, or painted direct on the wall. Regardless, murals should use high quality, durable, graffiti-resistant, and weather resistant materials and should have properly prepared surfaces prior to installation including cleaning, scraping debris, and filling holes to ensure a high quality and durable finish.

✓ Commercial Buildings
✓ Mixed-Use Buildings

3. Murals should be an original piece of artwork with the primary function of providing visual interest without any commercial advertising function, as expressions of the character and history of Downtown Orillia.
4. Murals should be completed by a qualified professional artist.
5. Where lighting of murals is desired, externally mounted lighting should be used installed and oriented in a night-sky friendly fashion that limits horizontal and vertical light spillover.

Principle 15: Parking areas located away from the street edge.

Design Guidelines:

1. Underground parking or parking internal to the building structure is generally preferred in all cases, where it is possible and feasible.
2. Where surface parking is required, it should be located to the rear of the building, and not between the front or exterior side of a building and the abutting public street right-of-way.
3. Access to parking areas should be from side streets, whenever possible.
4. Parking areas should be coordinated across several properties to maximize connectivity, improve flows, and improve parking yield and efficiency where possible.
5. Short-term bicycle parking, such as bike racks, should be provided in locations that are close to building entrances but situated to avoid any conflicts for movement along pedestrian routes.

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

Principle 16: Surface parking lots designed to be efficient for movement of pedestrians and vehicles.

Design Guidelines:

1. Surface parking lots should be organized with parking aisles oriented perpendicular to the building's primary entrance, whenever possible, in order to minimize the number of potential pedestrian-vehicle movement conflicts.
2. Pedestrian routes through parking areas should be wide enough to accommodate comfortable two way travel, and have a texture, material, colour change, or marking to differentiate it from the

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

remainder of the parking area and define the pedestrian route.

3. Landscaped islands should be used to minimize the visual extent of the paved area.
4. Landscaped areas around the parking area and within parking islands should be wide enough for adequate root growth of deciduous trees.
5. Landscape designs should emphasize the use of tree and shrub species that are native, low maintenance, and salt tolerant, and that provide seasonal interest through the use of coniferous and deciduous plant materials.

Principle 17: Larger development blocks divided into smaller components for movement.

Design Guidelines:

1. Development blocks that are 100 metres wide by 125 to 175 metres long is a general pattern within the Community Improvement Project Area.
2. This size should be used as a general reference threshold for providing additional connections through an undeveloped block.
3. Through connections through larger blocks can be made through the extension of public streets, walkways, or internal courtyards.
4. Courtyards or amenity areas should have clearly defined walkways through the space that are lined with canopy trees and plantings to frame the open space and connect with building entrances.
5. Courtyards or amenity areas should be situated to maximize natural surveillance opportunities from buildings, streets and walkways.

✓ Residential Buildings
✓ Mixed-Use Buildings

Principle 18: Plantings and landscape features provide attractive edges to the site.

Design Guidelines:

1. Areas on a site that should be landscaped and regularly maintained include yards that are visible from streets, sidewalks, and/or other public spaces; yards that are abutting adjacent residential properties; outdoor amenity areas on the site; and surrounding and within parking lots.

✓ Commercial Buildings
✓ Residential Buildings
✓ Mixed-Use Buildings

2. Site edges without building presence facing public streets should be appropriately landscaped to provide an attractive edge to the streetscape, preferably in a landscaped area at least 3 metres wide.
3. Shrubs and perennials adjacent to the public right-of-way should be maintained so that they are no more than 1.0 metre in height to preserve sight lines into and from the site.
4. Site edges abutting existing low rise residential properties should have buffer areas at least 3 metres wide, although fencing and taller plantings are encouraged where buffering and screening may be necessary.

Principle 19: Building and site lighting organized and oriented to cater to the needs of both drivers and pedestrians.

Design Guidelines:

1. Lighting fixtures should be installed and oriented in a “night-sky friendly” fashion that limits horizontal and vertical light spillover.
2. Lighting should be incorporated at regular intervals to prevent the creation of light and dark pockets to ensure visibility into and out from all areas requiring lighting.
3. Pedestrian activity areas should be lit at night with low profile fixtures, including surface parking lots, building entrances, sidewalks and walkways, garbage disposal areas; and other areas.
4. The type and style of lighting for sites should be consistent with lighting standards for the streetscape and abutting public spaces, including consideration of pole style and colour, bulb type, and mounting height, as well as consistent with the character of the building.

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

Principle 20: Utility areas and equipment sensitively integrated and appropriately screened from public view.

Design Guidelines:

1. Garbage storage, loading, and utility areas should be located in inconspicuous locations that are away from public view.
2. Garbage storage, loading, and utility areas should be shared between buildings on the same block as much as possible to

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

minimize disruptions to vehicular or pedestrian flows.

3. Accesses to service areas should be from the rear of buildings to reduce the number of driveways from the public street.

Principle 21: Sustainability initiatives considered and incorporated at the initial stages of planning and design.

Design Guidelines:

1. Maximize the amount of north-facing building exposures which provide diffuse daylighting and south-facing passive solar heating opportunities.
2. Use permeable or pervious surface materials for surface parking areas.
3. Use high albedo surface materials on surface parking areas, such as concrete or light coloured asphalt, to minimize heat absorption.
4. Use deciduous trees in strategic locations surrounding buildings to provide natural shading.
5. Select native species of plants that are hardy, salt tolerant, and sustainable in an urban environment.
6. Use xeriscape planting practices, including the use of drought-tolerant plant species, to avoid the need for irrigation systems and maximize water conservation efforts.
7. Consider landscape schemes that use groundcover plants and mulching of plantings beds to reduce weeds and maintain soil moisture, in lieu of sod that would require intensive watering and maintenance.
8. Incorporate opportunities for utilizing non-potable water sources where irrigation is required, such as roof capture, in combination with drip irrigation systems.
9. Utilize rainwater practices for ground infiltration where re-use is not needed, such as permeable surfaces, drainage swales, infiltration trenches, or soakway pits.
10. Incorporate green roofs or community gardens on exposed roofs of above-grade parking structures for community use and visual relief.

- ✓ Commercial Buildings
- ✓ Residential Buildings
- ✓ Mixed-Use Buildings

8.0 INCENTIVE PROGRAMS

8.1 Approach

The incentive programs contained in this section of the CIP were specifically developed to address the priority community improvement needs identified in Section 5.0 that lend themselves to being addressed via private sector building and development activity that would respond to the provision of incentive programs by the municipality. These priority community improvement needs are in turn based on the results of the background policy review, community improvement needs analysis and input from the public, Council and the project review team (PRT). While responding to the priority community improvement needs in Downtown Orillia, the incentive programs were also based on the long-term vision, goals and strategies in the Downtown Tomorrow Plan (DTP) and considerable stakeholder and public consultation and Council input, as described earlier in this report.

The financial incentive programs contained in this CIP represent a comprehensive tool kit of programs specifically designed to address the priority community improvement needs, and over time, help achieve the long-term vision for Downtown Orillia laid out in the DTP. These financial incentive programs are designed to encourage private sector investment, rehabilitation, adaptive reuse, redevelopment, and construction activity in Downtown Orillia. The City may accept applications all year round for any of the incentive programs contained in this CIP, or the City may periodically issue a Request for Applications (RFA) for any of the incentive programs contained in this CIP, e.g., once or twice per year, depending on budget considerations and program interest.

The incentive programs contained in this CIP can be considered a “toolkit” because once the CIP is adopted and approved, the incentive programs in the CIP can be activated by Council, one or more at a time, based on Council approval of the implementation of each program, subject to the availability of funding. In this regard, the CIP enables Council to implement the incentive programs, but does not obligate Council to implement these programs. The incentive programs are tools for Council to use to help achieve the vision for Downtown Orillia, and Council will decide which incentive programs to implement. The programs are also referred to as a “toolkit” because once activated, these programs can be used individually or together by an applicant as the programs apply to that applicant’s particular development, just like the tools in a toolbox.

General requirements that apply to all the programs contained in this CIP and program specific requirements have been included in this CIP to help ensure that the vision for the Project Area will be achieved while protecting the financial interests of the City. **Table 1** below summarizes basic program details for each of the incentive programs. When implementing the incentive programs summarized in Table 1 and described in greater detail in the balance of this section, depending on budget considerations at the time, Council can:

- i) set the maximum grant available for each incentive program at or below the maximum specified for that program herein; and,

- ii) establish that the grant for each incentive program will be equal to a percentage (up to 100%) of total eligible program costs or a dollar value per square foot of eligible space rehabilitated or created.

The balance of this section provides a description of the general program requirements, and basic details for each incentive program including the program purpose, description, and requirements. Administrative guidelines for each of the incentive programs contained in this CIP are provided in **Appendices D to I**. These appendices do not form part of the CIP, and therefore may be changed from time to time as required, without amendment to this Plan.

Table 1 Summary of Incentive Programs

Program	Description	Recommended Program Duration ¹
1. Feasibility/Design Study Grant Program	Grant equal to 50% of the cost for an urban design study and/or professional architectural/design drawing(s) and/or eligible feasibility study to a maximum grant of \$5,000 per property.	Approximately five (5) years, with an option to extend for five (5) years, subject to availability of funding as approved by Council.
2. Facade Improvement Grant Program	Grant equal to 50% of the cost of eligible front, side and rear facade improvement/restoration works to commercial, institutional, residential and mixed use buildings to a maximum grant per property of \$25,000. The maximum total Façade Improvement Grant can be increased by up to \$7,500 (on a matching 50/50 basis) per property for properties that are designated under the <i>Ontario Heritage Act</i> .	Approximately ten (10) years, subject to availability of funding as approved by Council.
3. Building Improvement Grant Program	Grant equal to 50% of the cost of eligible building improvement works to commercial, institutional and mixed use buildings to a maximum grant per property of \$25,000 OR Grant equal to the cost of interest on a commercial loan for up to 5 years to a maximum grant per property of \$25,000.	Approximately ten (10) years, subject to availability of funding as approved by Council.
4. Residential Grant Program	Grant equal to up to 100% of the cost of residential space rehabilitated or created to a maximum grant of \$60,000 per property and maximum of 4 units per property; OR Grant equal to the cost of interest on a commercial loan for up to 5 years to a maximum grant of \$60,000 per property and maximum of 4 units per property;	Approximately ten (10) years, subject to availability of funding as approved by Council.
5. Brownfields Tax Assistance Program	Cancellation of part or all of the municipal property taxes and education property taxes for up to 3 years. Cancellation of education property taxes is subject to approval by the Minister of Finance.	Approximately ten (10) years.

¹ Council may reduce or extend the program duration of any or all of the programs in this table beyond what is shown without amendment to the CIP.

Program	Description	Recommended Program Duration ²
6. Tax Increment Grant Program	Annual grant equal to 70% of the increase in municipal property taxes for up to 10 years after project completion. The project must result in an increase in assessment and property taxes. Annual grant equal to 100% of the increase in municipal property taxes for up to 12 years after project completion if project is on a remediated/risk assessed brownfield site.	Approximately ten (10) years.
7. Development Charge Grant Program	Grant equal to up to 100% of the City Development Charges normally payable for “catalytic projects”, i.e., as-built projects that include criteria such as: - Significant impact on assessment value and property taxes; - Large brownfield redevelopment projects; - Exemplary urban design and/or maintain heritage character; - Incorporates sustainability principles and technologies; - Achieves affordable housing targets; - Will spur rehabilitation/redevelopment in nearby area. (See Appendix J).	Approximately five (5) years with an option to extend for five (5) years, subject to availability of funding as approved by Council.
8. Fees Grant Program	Grant equal to 100% of fees paid for planning applications, building permits, and sign permits for applications approved under programs 2-7 above to a maximum grant of \$5,000.	Approximately five (5) years with an option to extend for five (5) years, subject to availability of funding as approved by Council.

8.2 General Program Requirements

All of the financial incentive programs contained in this CIP are subject to the following general requirements as well as the individual requirements specified under each program. The general and program specific requirements contained in this CIP are not necessarily exhaustive, and the City reserves the right to include other requirements and conditions as deemed necessary on a program and/or property specific basis:

- Application for any of the incentive programs contained in this Plan can be made only for properties within the Community Improvement Project Area;
- The City may restrict eligibility for any of the incentive programs contained in this Plan to certain land uses at certain times to help ensure that funded projects maximize community improvement benefits and achieve the City's goals for the Downtown;
- With the exception of the Fees Grant Program, an application for any financial incentive program contained in this CIP must be submitted to the City prior to the commencement of any works or studies to which the financial incentive program will apply and prior to application for building permit;

² Council may reduce or extend the program duration of any or all of the programs in this table beyond what is shown without amendment to the CIP.

- d) Except for the following programs, the applicant must be the owner of the property,:
 - i) Feasibility/Design Study Grant Program;
 - ii) Façade Improvement Grant Program;
 - iii) Building Improvement Grant Program;
 - iv) Fees Grant Program.

For the programs as noted in d) i) to iv) above, if the applicant is not the owner of the property, the applicant must provide written consent from the owner of the property to make the application;

- e) An individual, corporation or other party who has litigation pending against the City is not eligible to apply for any of the incentive programs contained in this CIP;
- f) An application for any financial incentive program contained in this CIP must include plans, estimates, contracts, reports, rental rates, sale prices, and other details as required by the City to satisfy the City with respect to costs of the project and conformity of the project with the CIP;
- g) The City may require that an applicant submit professional urban design studies and/or professional architectural/ design drawings that are in conformity with Design Principles and Guidelines put in place by the City;
- h) Review and evaluation of an application and supporting materials against program eligibility requirements will be done by City staff, who will then make a recommendation to City Council or Council's designate. The application is subject to approval by City Council or Council's designate;
- i) As a condition of application approval, the applicant may be required to enter into a grant agreement with the City. This Agreement will specify the terms, duration and default provisions of the incentive to be provided. This Agreement is also subject to approval by City Council or Council's designate;
- j) Each program in this CIP is considered active if Council has approved implementation of the program, and Council has approved a budget allocation for the program (as applicable);
- k) Where other sources of government and/or non-profit organization funding (Federal, Provincial, Municipal, CMHC, Federation of Canadian Municipalities, etc...) that can be applied against the eligible costs are anticipated or have been secured, these must be declared as part of the application, and accordingly, the grant from the City may be reduced on a pro-rated basis;
- l) The City reserves the right to audit the cost of any and all works that have been approved under any of the financial incentive programs, at the expense of the applicant;
- m) The City is not responsible for any costs incurred by an applicant in relation to any of the programs, including without limitation, costs incurred in anticipation of a grant;
- n) If the applicant is in default of any of the general or program specific requirements, or any other requirements of the City, the City may delay, reduce or cancel the approved grant, and require repayment of the approved grant;
- o) The City may discontinue any of the programs contained in this CIP at any time, but applicants with approved grants will still receive said grant, subject to meeting the general and program specific requirements;

- p) All proposed works approved under the financial incentive programs and associated improvements to buildings and/or land must conform to the Design Principles and Guidelines, the Heritage Conservation District Guidelines (if and as approved), and all other City guidelines, by-laws, policies, procedures, and standards;
- q) All works completed must comply with the description of the works as provided in the application form and contained in the program agreement, with any amendments as approved by the City;
- r) Existing and proposed land uses must be in conformity with applicable Official Plan(s), Zoning By-law and other planning requirements and approvals;
- s) All improvements made to buildings and/or land shall be made pursuant to a Building Permit, and/or other required permits, and constructed in accordance with the Ontario Building Code and all applicable zoning requirements and planning approvals;
- t) When required by the City, outstanding work orders, and/or orders or requests to comply, and/or other charges from the City must be satisfactorily addressed prior to grant approval/payment;
- u) Property taxes must be in good standing at the time of program application and throughout the entire length of the grant commitment;
- v) City staff, officials, and/or agents of the City may inspect any property that is the subject of an application for any of the financial incentive programs offered by the City;
- w) Eligible applicants can apply for one, more or all of the incentive programs contained in this CIP, but no two programs may be used to pay for the same eligible cost;
- x) Applicants approved for the programs contained in this CIP will be required to complete the eligible works within specified timeframes; and,
- y) The total of all grants, loans and tax assistance provided in respect of the particular property for which an applicant is making application under the programs contained in this CIP and any other applicable CIPs shall not exceed the eligible cost of the improvements to that particular property under all applicable CIPs.

8.3 Feasibility/Design Study Grant Program

8.3.1 Purpose

- To promote studies that determine the feasibility of adaptively reusing, rehabilitating, retrofitting, converting, redeveloping or developing commercial, residential, and mixed used buildings;
- To help ensure that professional urban design studies and architectural/ design drawings meet the City's Design Principles and Guidelines and any other applicable Guidelines; and,
- To help offset the costs of preparing the above-noted professional feasibility studies, urban design studies and architectural/design drawings.

8.3.2 Description

This program will provide a matching grant of 50% of the cost of professional urban design studies and/or architectural/design drawings required by the City, and/or eligible feasibility studies, to a maximum grant per property/project of \$5,000. An application for a property/project can be for up to two eligible studies, subject to a maximum grant per property/project (regardless of the number of studies) of \$5,000.

Eligible feasibility studies include but are not limited to:

- a) Environmental studies including phase II environmental site assessments, designated substances and hazardous materials surveys, risk assessments, and remedial work plans;
- b) Planning feasibility studies;
- c) Heritage impact statements;
- d) Archaeological assessments;
- e) Geotechnical studies;
- f) Building foundation analyses/studies and structural analyses;
- g) Evaluation of existing and proposed mechanical, electrical and other building systems;
- h) Concept plans;
- i) Market analyses; and,
- j) Any other feasibility study as approved by the City.

8.3.3 Program Requirements

Applicants are eligible to apply for funding under this program, subject to meeting the general program requirements, the following program requirements, and subject to the availability of funding as approved by Council:

- a) All urban design studies/drawings, architectural/design drawings and feasibility studies must:
 - i) be submitted to the City in electronic and hard copy format for the City's review and retention;
 - ii) be to the satisfaction of the City; and,
 - iii) meet the City's Design Principles and Guidelines any other applicable City guidelines, by-laws, policies, procedures, and standards.
- b) In the case of eligible environmental studies (8.3.2 a) above):
 - i) applicants must complete and submit to the City for review a Phase I ESA that demonstrates that site contamination is likely;
 - ii) all environmental studies shall be completed by a "qualified person" as defined by Ontario Regulation 153/04

8.4 Façade Improvement Grant Program

8.4.1 Purpose

To promote the rehabilitation, restoration and improvement of the front, side and rear facades of commercial, institutional, residential and mixed use buildings, including retail storefront display areas and signage.

8.4.2 Description

This program will provide a grant equal to 50% of the cost of eligible front, side and rear facade improvement and restoration works to commercial, institutional, residential and mixed use buildings up to a maximum grant per property of \$25,000.

The maximum total Façade Improvement Grant can be increased by up to \$7,500 per property (on a matching 50/50 basis) for properties that are also designated under Part IV of the *Ontario Heritage Act*.

The City may consider applications for phased façade improvements on a property subject to the maximum grant amounts noted above.

The City may give higher priority to applications for this program on properties within the Downtown Orillia Business Improvement Area (BIA).

8.4.3 Program Requirements

Applicants are eligible to apply for funding under this program, subject to meeting the general program requirements, the following program requirements, and subject to the availability of funding as approved by Council:

- a) The following types of building façade restoration and improvement works on commercial, institutional, residential and mixed use buildings are considered eligible for a grant under this program:
 - i) repair or replacement of storefront/office /institutional/residential facade, including repair or replacement of doors and windows;
 - ii) exterior and entrance modifications to provide barrier free accessibility
 - iii) repair or repointing of facade masonry and brickwork;
 - iv) repair or replacement of cornices, parapets, eaves, soffits and other architectural details;
 - v) repair or replacement of awnings or canopies;
 - vi) facade painting, cleaning, treatments, and refinishing as acceptable to the City;
 - vii) addition of new lighting/upgrading of existing fixtures on exterior facade and in entrance and storefront display areas;
 - viii) installation/improvement of signage (as permitted by the Sign By-law);
 - ix) landscaping, including plant materials (to a maximum of 15% of the approved grant amount);
 - x) architectural/design fees required for eligible works (to a maximum of 10% of the approved grant amount); and,
 - xi) other similar repairs/improvements as may be approved.
- b) In addition to the eligible costs specified in a) above, the following types of building façade restoration and improvement works on commercial, institutional, residential and mixed use buildings designated under the Ontario Heritage Act are also considered eligible for a grant under this program:
 - i) works that conserve or enhance elements specified in the Reasons for Designation accompanying the designating by-law under the Ontario Heritage Act;
 - ii) original siding and roofing materials including repair and replacement where necessary of wood clapboard or board-and-batten, repair and repointing of masonry buildings, stucco repair, repair or

- replacement of original roofing materials (slate, wood shingles, tile, etc.);
 - iii) removal of modern materials and replacement with documented original materials;
 - iv) reconstruction or construction of former and significant architectural features for which the appearance can be clearly determined from documentary sources (photographs, drawings, etc.);
 - v) cleaning of masonry buildings if it is necessary for the building's preservation;
 - vi) all final finishes, such as paint and masonry are eligible for funding subject to approval; and
 - vii) works required to maintain or preserve significant architectural features.
- c) For commercial, institutional, residential and mixed use buildings designated under the *Ontario Heritage Act*, the facade restoration and improvement works should be supported by documentation in the form of historic photographs or drawings clearly showing the feature(s) to be restored or reconstructed.

8.5 Building Improvement Grant Program

8.5.1 Purpose

To promote the maintenance and physical improvement of existing commercial, institutional and mixed use buildings and properties, in order to improve the attractiveness of the Project Area and provide safe and usable commercial, residential and mixed use space.

8.5.2 Description

This program may be offered in the form of a grant, either:

- a) Type 1 - a lump-sum grant equal to 50% of the cost of eligible interior and exterior building and maintenance improvement works to commercial, institutional and mixed use buildings; or,
- b) Type 2 - a grant equal to the cost of interest on a commercial loan taken out by the applicant to pay for the cost of eligible interior and exterior building and maintenance improvement works to commercial, institutional and mixed use buildings, with said grant paid to the applicant on a periodic basis.

8.5.2.1 Type 1 Grant Program

The Building Improvement Type 1 Grant Program will provide a grant equal to 50% of the cost of eligible interior and exterior building and maintenance improvement works to commercial, institutional and mixed use buildings up to a maximum grant per property of \$25,000.

8.5.2.2 Type 2 Grant Program

The Building Improvement Type 2 Grant Program will provide a grant equal to the cost of interest on a commercial loan taken out by the applicant to pay for the cost of eligible interior and exterior building and maintenance improvement works to commercial, institutional and mixed use buildings up to a maximum grant per property of \$25,000. The Type 2 Grant will be paid by the City to the applicant on a periodic basis for 5 years, or until the commercial loan is paid off by the applicant, whichever comes first.

The City will decide which type of Grant Program (Type 1 or Type 2) it will utilize after adoption and approval of the CIP.

8.5.3 Program Requirements

Applicants are eligible to apply for funding under this program, subject to meeting the general program requirements, the following program requirements, and subject to the availability of funding as approved by Council:

- a) The following types of building maintenance and improvement works on commercial, institutional and mixed use buildings are considered eligible for a grant under this program:
 - i) exterior and interior modifications to provide barrier-free accessibility;
 - ii) installation/upgrading of fire protection systems;
 - iii) repair/replacement of roof;
 - iv) structural repairs to walls, ceilings, floors and foundations;
 - v) water/flood/weatherproofing;
 - vi) repair/replacement of windows and doors;
 - vii) extension/upgrading of plumbing and electrical services for the creation of retail, office or residential space;
 - viii) installation/alteration of required window openings to residential spaces;
 - ix) required improvements to heating and ventilation systems;
 - x) construction/improvement of pedestrian infrastructure such as walking paths and alleyways;
 - xi) construction/improvement of public gathering spaces such as patios and squares, and
 - xii) other similar repairs/improvements related to health and safety issues, as may be approved.
- b) As a condition of Type 2 Grant payment, the City will require the applicant to provide proof of commercial loan repayment.
- c) If during the Type 2 grant period, a building receiving a Type 2 Grant is demolished and not rebuilt, all grant payments from the City shall cease, and all grant payments already made by the City will be repayable to the City;
- d) If during the Type 2 grant period, a building designated under the *Ontario Heritage Act* receiving a Type 2 Grant is demolished and not rebuilt, or any of the heritage features are altered in any way that would compromise the reasons for designation, all grant payments from the City shall cease, and all grant payments already made by the City will be repayable to the City; and,
- e) For commercial, institutional and mixed use buildings designated under the *Ontario Heritage Act*, the building improvement works should be supported by documentation in the form of historic photographs or drawings clearly showing the feature(s) to be restored or reconstructed.

8.6 Residential Grant Program

8.6.1 Purpose

To promote the renovation of existing residential units and the construction of new residential units through;

- a) Renovations to existing residential units in mixed use buildings to bring these units into compliance with the Building Code, Property Standards By-law and the Fire Code; or,
- b) Conversion of excess commercial and/or vacant space on upper stories of commercial and mixed use buildings to one or more net residential units; or,
- c) The infilling of vacant lots with two or more net residential units.

8.6.2 Description

This program may be offered by the City in the form of a grant, either:

- a) Type 1 Grant - a lump-sum grant equal to up to 100% of the cost of rehabilitating existing residential units and/or constructing new residential units, or,
- b) Type 2 Grant - a grant equal to up to 100% of the cost of interest on a commercial loan taken out by the applicant to pay for the cost of rehabilitating existing residential units and/or constructing new residential units, with said grant paid to the applicant on a periodic basis.

The Residential Grant Program can be used for rental or ownership units. If used for ownership units, the grant may apply to buildings that fall under the *Condominium Act*.

The City will decide which type of Grant Program (Type 1 or Type 2) it will utilize after adoption and approval of the CIP.

8.6.2.1 Type 1 Grant Program

The Residential Grant Type 1 Program will provide a grant equal to up to 100% of the cost of rehabilitating existing residential units and/or constructing new residential units to a maximum grant of \$60,000 per property, and a maximum of 4 units per property.

8.6.2.2 Type 2 Grant Program

The Residential Grant Type 2 Program will provide a grant equal to up to 100% of the cost of interest on a commercial loan taken out by the applicant to pay for the cost of rehabilitating existing residential units and/or constructing new residential units, with this cost paid as a grant to a maximum grant of \$60,000 per property, and a maximum of 4 units per property.

Preference for funding under this program will be given to multi-unit applications.

8.6.3 Program Requirements

Applicants are eligible to apply for funding under this program, subject to meeting the general program requirements, the following program requirements, and subject to the availability of funding as approved by Council:

- a) The following types of projects are considered eligible for a grant under this program:
 - i) renovations to existing residential units in a mixed use building to bring these units into compliance with the Building Code, Property Standards By-law and the Fire Code;
 - ii) conversion of excess commercial and/or vacant space on upper stories of commercial and mixed use building to one or more net residential units; and,
 - iii) vacant lots (including parking lots) converting to mixed use or residential use where two or more net residential units are created.
- b) The City may require the applicant to submit for approval impact studies such as traffic studies and studies of microclimatic conditions (sun, shadow, wind).
- c) As a condition of Type 2 Grant payment, the City will require the applicant to provide proof of commercial loan repayment.
- d) If during the Type 2 grant period, a building receiving a Type 2 Grant is demolished and not rebuilt, all grant payments from the City shall cease, and all grant payments already made by the City will be repayable to the City; and,
- e) If during the Type 2 grant period, a building designated under the Ontario Heritage Act receiving a Type 2 Grant is demolished and not rebuilt, or any of the heritage features are altered in any way that would compromise the reasons for designation, all grant payments from the City shall cease, and all grant payments already made by the City will be repayable to the City.

8.7 Brownfields Tax Assistance Program

8.7.1 Purpose

The purpose of the Brownfields Tax Assistance Program (TAP) is to encourage the remediation and rehabilitation of brownfield sites by providing a cancellation of property taxes on a property to assist with payment of the cost of environmental remediation. This program applies only to properties requiring environmental remediation and/or risk assessment/ management.

8.7.2 Description

This program will provide a cancellation of part or all of the property taxes on a property during the “rehabilitation period” and the “development period” on that property. This financial incentive is referred to as “tax assistance”.

The legislative authority for the Brownfields TAP is established under Sections 365.1 (2) of the *Municipal Act, 2001* which allows municipalities to pass a by-law providing tax assistance to an eligible property in the form of cancellation of all or part of the taxes levied on that property for municipal and education purposes during the “rehabilitation period” and the “development period” of the property, as defined in Section 365.1 of the *Municipal Act, 2001*.

An “eligible property” for the Brownfields TAP is a property within the Project Area where a Phase II Environmental Site Assessment (ESA) has been conducted, and that as of the date the Phase II ESA was completed, did not meet the required standards under subparagraph 4i of Section 168.4(1) of the *Environmental Protection Act* to permit a Record of Site Condition (RSC) for the proposed use to be filed in the Environmental Site Registry.

“Eligible costs” for the Brownfields TAP are the costs of any action taken to reduce the concentration of contaminants on, in or under the property to permit a record of site condition (RSC) for the proposed use to be filed in the Environmental Site Registry under Section 168.4 of the *Environmental Protection Act*. This includes the cost of:

- a) a Phase II ESA, Designated Substances and Hazardous Materials Survey, Remedial Work Plan, and Risk Assessment not disbursed by the ESA Grant Program;
- b) environmental remediation, including the cost of preparing a RSC;
- c) placing clean fill and grading;
- d) installing environmental and/or engineering controls/works as specified in the Remedial Work Plan and/or Risk Assessment;
- e) monitoring, maintaining and operating environmental and engineering controls/works, as specified in the Remedial Work Plan and/or Risk Assessment; and,
- f) environmental insurance premiums.

In no case will the total amount of tax assistance provided under the Brownfields TAP exceed the total of these eligible costs.

The municipal property tax assistance provided will cease:

- a) when the total tax assistance provided equals the total eligible costs as specified above; or,
- b) after three (3) years, whichever comes first.

Matching education property tax assistance is subject to approval by the Minister of Finance and will cease:

- a) when the total tax assistance provided equals the total eligible costs as specified above; or,
- b) after three (3) years, whichever comes first.

The City will apply to the Ministry of Finance for matching education property tax assistance on behalf of the property owner. Matching education property tax assistance for eligible properties under the provincial Brownfields Financial Tax Incentive Program (BFTIP), or through any other replacement programs administered by the Province, is subject to approval of the Minister of Finance on a case by case basis,

may be provided on a different schedule from the tax assistance provided by the municipality, and may be subject to additional conditions.

If a property that has been approved for brownfields tax assistance is severed, subdivided, sold or conveyed prior to the end of the tax assistance period specified above, both the education property tax assistance and the municipal property tax assistance will automatically end.

Any property approved for tax assistance will be subject to passing of a by-law by the City that authorizes the provision of the tax assistance. This by-law will contain conditions required by the City as well as conditions required by the Minister of Finance. In order for the by-law to apply to education property taxes, before it is passed by the City, the by-law must be approved in writing by the Minister of Finance.

8.7.3 Program Requirements

Only owners of property within the community improvement project area are eligible to apply for funding under this program, subject to meeting the general program requirements, the following program requirements, and subject to availability of funding as approved by Council and the Minister of Finance:

- a) An application must be submitted to the City prior to the start of any remediation works to which the tax assistance will apply;
- b) The application must be accompanied by a Phase II ESA prepared by a qualified person that shows that the property does not meet the standards under subparagraph 4i of Section 168.4(1) of the *Environmental Protection Act* to permit a Record of Site Condition (RSC) for the proposed use to be filed in the Environmental Site Registry;
- c) The application must be accompanied by a Phase II ESA, Remedial Work Plan or Risk Assessment prepared by a qualified person that contains:
 - i) an estimate of the cost of actions that will be required to reduce the concentration of contaminants on, in or under the property to permit a record of site condition (RSC) for the proposed use to be filed in the Environmental Site Registry under Section 168.4 of the *Environmental Protection Act*; and,
 - ii) a work plan and budget for said environmental remediation and/or risk management actions;
- d) The City may require the applicant to submit a Business Plan for redevelopment of the property, with said plan to the municipality's satisfaction;
- e) The property shall be rehabilitated such that the work undertaken is sufficient to at a minimum result in an increase in the assessed value of the property;
- f) The total value of the tax assistance provided under this program shall not exceed total eligible costs. This includes the eligible costs of:
 - i) a Phase II ESA, Designated Substances and Hazardous Materials Survey, Remedial Work Plan, and Risk Assessment not disbursed by the ESA Grant Program;

- ii) environmental remediation, including the cost of preparing a RSC;
 - iii) placing clean fill and grading;
 - iv) installing environmental and/or engineering controls/works as specified in the Remedial Work Plan and/or Risk Assessment;
 - v) monitoring, maintaining and operating environmental and engineering controls/works, as specified in the Remedial Work Plan and/or Risk Assessment;
 - vi) environmental insurance premiums;
- g) Should the owner of the property default on any of the conditions in the City approved by-law, deferred property taxes (plus interest) will become payable to the City and Province;
- h) Upon completion of remediation/risk assessment, the owner shall file in the Environmental Site Registry a RSC for the property signed by a qualified person, and the owner shall submit to the City proof that the RSC has been acknowledged by the Ministry of Environment (MOE).

8.8 Tax Increment Grant Program

8.8.1 Purpose

To encourage and support rehabilitation, redevelopment, infill and intensification projects in the Project Area by providing a financial incentive that reduces the property tax increase that can result from these various types of development. This incentive is also designed to assist in securing project financing.

8.8.2 Description

This program will provide a tax increment based grant equal to 70% of the municipal property tax increase for up to 10 years following completion of an eligible project where that project creates an increase in assessment, and therefore an increase in property taxes. For projects on brownfield sites, i.e., on sites where a Phase II Environmental Site Assessment (ESA) has been conducted, and that as of the date the Phase II ESA was completed, did not meet the required standards under subparagraph 4i of Section 168.4(1) of the *Environmental Protection Act* to permit a Record of Site Condition (RSC) for the proposed use to be filed in the Environmental Site Registry, the program will provide a tax increment based grant equal to 100% of the municipal property tax increase for up to 12 years following completion of the project³.

The grant will be paid annually once:

- a) The eligible project is complete;
- b) Final building inspections have taken place;
- c) An occupancy permit has been issued (as applicable);
- d) All deficiencies have been addressed;
- e) The property has been reassessed by the Municipal Property Assessment Corporation (MPAC); and,
- f) The new property taxes have been paid in full for the year.

³ The City may establish a minimum remediation cost and minimum risk assessment/risk management cost required to qualify for the 12 year 100% Tax Increment Grant.

Pre-project Municipal taxes will be determined before commencement of the project at the time the application is approved. For purposes of the grant calculation, the increase in municipal taxes will be calculated as the difference between pre-project municipal taxes and post-project municipal taxes that are levied as a result of re-valuation of the property by the MPAC following project completion. Grant payments will cease when the total grant along with all other grants and loans provided equals the cost of rehabilitating the lands and buildings, or after 10 years (12 years for projects on brownfield sites), whichever comes first.

For projects on brownfield sites, an application can be made for the Brownfields Tax Assistance Program, the Tax Increment Grant Program, or both programs together. If an application for both the Brownfields Tax Assistance Program and the Tax Increment Grant Program has been approved, eligibility for the annual grant available under the Tax Increment Grant Program will begin when the benefits of the Brownfields Tax Assistance Program end, and the applicant may receive up to 15 years of brownfields tax assistance and tax increment grants.

8.8.3 Program Requirements

Applicants are eligible to apply for funding under this program, subject to meeting the general program requirements and the following program requirements:

- a) The following types of projects are considered eligible for this program:
 - i) existing commercial, residential and mixed use buildings, vacant properties and parking lots where the redevelopment or rehabilitation project results in an increase in the assessed value and taxes on the property⁴;
- b) The City may require the applicant to submit a Business Plan, with said plan to the municipality's satisfaction;
- c) The City may require the applicant to submit for approval impact studies such as traffic studies and studies of microclimatic conditions (sun, shadow, wind);
- d) If during the grant period, a building receiving a Tax Increment Grant is demolished and not rebuilt, all grant payments shall cease and the City reserves the right to require repayment of the grant payments;
- e) If during the grant period, a building/property designated under the Ontario Heritage Act receiving a Tax Increment Grant is demolished and not rebuilt, or any of the heritage features are altered in any way that would compromise the reasons for designation, all grant payments shall cease and the City reserves the right to require repayment of the grant payments.

For projects on brownfield sites, the following additional program requirements apply:

- f) The application must be accompanied by a Phase II ESA, Remedial Work Plan or Risk Assessment Plan prepared by a qualified person that contains:

⁴ This program does not apply to any residential construction project that creates less than two net residential units.

- i) an estimate of the cost of actions that will be required to reduce the concentration of contaminants on, in or under the property to permit a record of site condition (RSC) to be filed in the Environmental Site Registry under Section 168.4 of the Environmental Protection Act; and,
 - ii) a work plan and budget for said environmental remediation, and/or risk management actions;
- g) Upon completion of remediation/risk assessment, the owner shall file in the Environmental Site Registry an RSC for the property signed by a qualified person, and the owner shall submit to the City proof that the RSC has been acknowledged by the Ministry of Environment (MOE).

8.9 Development Charge Grant Program

8.9.1 Purpose

The purpose of this program is to encourage and support major “catalytic” projects in the Project Area by providing a financial incentive that reduces or completely removes the City’s development charge payable on such development projects. This incentive is also designed to assist in securing project financing.

8.9.2 Description

“Catalytic projects” are residential, commercial and mixed use development, redevelopment or adaptive building reuse projects that as a result of their large scale and/or type of use can be expected to spur significant similar improvements in the surrounding area. Catalytic projects are typically large scale residential or mixed use development projects, especially those taking place on large vacant former industrial properties and infill lots. In the Downtown Orillia context, examples of “catalytic projects” include, but are not necessarily limited to:

- Development/redevelopment of large vacant and underutilized properties in the commercial core for large scale residential and mixed use development;
- Redevelopment of large vacant and underutilized former industrial properties (potential brownfield sites) for large scale residential and mixed use development;
- Development/redevelopment of vacant and underutilized properties on the Waterfront for residential, commercial and mixed use development; and,
- Projects that create affordable residential units.

The City’s Development Charge Grant Program will provide a grant equal to up to 100% of the City development charges normally payable on catalytic residential, commercial, mixed use and non-exempt institutional development and redevelopment projects in the Project Area. This grant will be structured as an initial deferral of up to 100% of the City development charges to be paid, with a grant paid by the City into its Development Charges Reserve Fund on behalf of the applicant at the end of the deferral period, only once:

- a) The eligible project is complete;
- b) Final building inspections have taken place;
- c) An occupancy permit has been issued (as applicable);
- d) All deficiencies have been addressed;

- e) All program and grant agreement requirements have been met to the City's satisfaction; and,
- f) The as-built project performance has been determined by the City.

The applicant would be responsible for payment of any portion of the City development charges not qualifying for the grant at the time development charges are normally paid, e.g., building permit issuance.

The determination of which projects meet the "catalytic project" requirement is based on the as-built project achieving minimum performance requirements as set out in **Appendix J**.

The City may elect to establish a maximum total grant that can be paid under this program per property/project.

8.9.3 Program Requirements

Applicants are eligible to apply for funding under this program subject to meeting the general program requirements, the following program requirements, and subject to the availability of funding as approved by Council:

- a) The following types of projects are considered eligible to apply for funding under this program:
 - i) Development/redevelopment of large vacant and underutilized properties in the commercial core for large scale residential and mixed use development;
 - ii) Redevelopment of large vacant and underutilized former industrial properties (potential brownfield sites) for large scale residential and mixed use development;
 - iii) Development/redevelopment of vacant and underutilized properties on the Waterfront for residential, commercial and mixed use development; and,
 - iv) Projects that create affordable residential units.
- b) The City may require the applicant to submit a Business Plan, with said plan to the municipality's satisfaction;
- c) The City may require the applicant to submit for approval impact studies such as traffic studies and studies of microclimatic conditions (sun, shadow, wind);

For projects on brownfield sites⁵, the following additional program requirements apply:

- d) The application must be accompanied by a Phase II ESA, Remedial Work Plan or Risk Assessment Plan prepared by a qualified person that contains:

⁵ Brownfield sites are sites where a Phase II Environmental Site Assessment (ESA) has been conducted, and that as of the date the Phase II ESA was completed, did not meet the required standards under subparagraph 4i of Section 168.4(1) of the *Environmental Protection Act* to permit a Record of Site Condition (RSC) for the proposed use to be filed in the Environmental Site Registry.

- i) an estimate of the cost of actions that will be required to reduce the concentration of contaminants on, in or under the property to permit a record of site condition (RSC) to be filed in the Environmental Site Registry under Section 168.4 of the Environmental Protection Act; and,
 - ii) a work plan and budget for said environmental remediation, and/or risk management actions;
- e) Upon completion of remediation/risk assessment, the owner shall file in the Environmental Site Registry an RSC for the property signed by a qualified person, and the owner shall submit to the City proof that the RSC has been acknowledged by the Ministry of Environment (MOE).

8.10 Fees Grant Program

8.10.1 Purpose

To facilitate and spur adaptive re-use, infill, intensification, and redevelopment through the provision of an additional financial incentive that will complement and augment the other incentive programs within the CIP.

8.11.2 Description

This program will provide a grant equal to 100% of the fees paid on specified planning and development applications, demolition/building permits and sign permits to a maximum total grant of \$5,000 per property approved under any of the other incentive programs in this CIP, with the exception of the Study Grant Program.

All planning and application fees will be paid as normal at the time of application. Separate application for the Fees Grant Program is not required. The Fees Grant will be paid upon project completion subject to the project meeting the performance and other requirements of the applicable program(s) under which the project was approved.

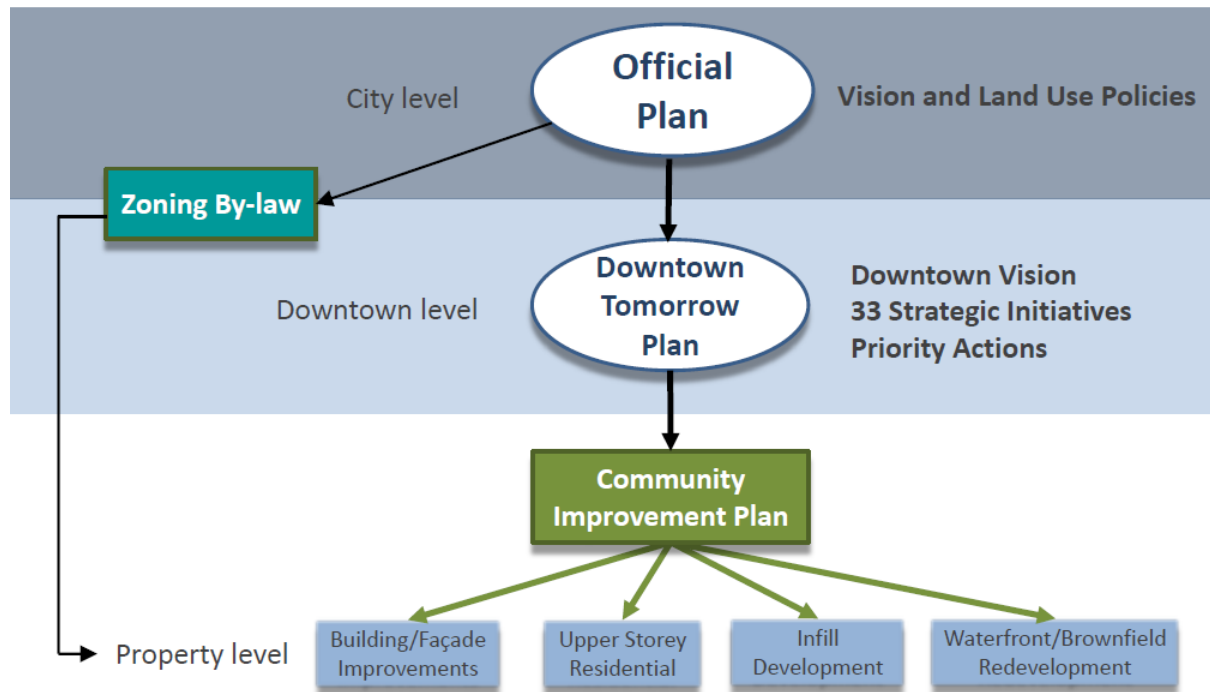
8.11.3 Program Requirements

The table in **Appendix K** provides a list of the types of planning and development applications and building permits that are considered eligible for this program. This program does not apply to security deposits or cash-in-lieu payments.

9.0 TYING IN THE DOWNTOWN TOMORROW PLAN

As previously noted, the preparation of a CIP for Downtown Orillia is one of the key priority recommendations in the Downtown Tomorrow Plan (DTP). The relationship between the DTP and the CIP is shown in **Figure 4** below. The CIP is one of the key implementation tools to help achieve the long-term vision and goals of the DTP.

Figure 4 The Downtown Tomorrow Plan and the Community Improvement Plan



In order to help achieve a high quality built environment, the Private Realm Guidelines in the DTP provide general guidance regarding aspects of private development such as land use, building heights and urban design. The Design Principles and Guidelines in this CIP take the goal of achieving a high quality built environment a step further by providing more specific design principles and guidelines in relation to private development that will take advantage of incentive programs offered by the municipality.

The incentive programs contained in this CIP will help to generate the very types of community improvement specified in the long-term Vision, Goals and Strategic Master Plan in the DTP, including building revitalization and improvement, upper storey residential conversions, infill, waterfront and brownfield redevelopment. As such, the DTP and the CIP share a symbiotic and mutually reinforcing relationship.

As shown in **Figure 5** below, the incentive programs contained in this CIP will directly or indirectly help implement at least 10 of the 33 recommended initiatives in the DTP. **Figure 6** shows that 14 of the 33 initiatives recommended in the DTP will potentially help support the CIP. Therefore, in total, 24 of the 33 recommendations in the DTP are either supported by this CIP or will help to support this CIP.

Figure 5 CIP Incentive Programs Help Implement Following DTP Initiatives

#	DTP Initiative	Direct	Indirect
01	Facilitate waterfront development	✓	
02	Encourage upper storey residential conversions	✓	
03	Encourage and support neighbourhood improvement		✓
08	Encourage improvements to Soldiers' Memorial Hospital		✓
13	Facilitate Living, Working and Event Space for Artists	✓	
14	Attract Specialty Retailers (Food, Fashion, Creativity and Play)		✓
16	Maintain and Improve Storefronts	✓	
17	Extend the Retail Experience to the Waterfront	✓	
32	Improve Access to Parking and Design of Parking Lots		✓
33	Target New Hotels in the Downtown	✓	

Figure 6 DTP Initiatives that Potentially Support the CIP

#	DTP Initiative
01	Facilitate Waterfront Development
06	Build leisure and wellness centre
09	Relocate City Hall
18	Upgrade and Enhance Mississauga Street
19	Beautify Coldwater Street and other Key entry streets
20	Redesign and Extend Centennial Drive
21	Build New Streets to the Waterfront
22	Identify the Downtown Bicycle Network
23	Build a New Square, Pier, and Pavilion in Centennial Park
24	Relocate Waterfront Parking/Reduce Boat Ramp Impacts
25	Create Multi-Use Park at 255 West Street South
27	Establish Queen Street Greenway
28	Develop Small Gathering Spaces/Neighbourhood Parks
30	Erect New Directional Signage and Wayfinding Signage

10.0 MONITORING PROGRAM

10.1 Purpose

The Monitoring Program set out in this section has several purposes. It is designed to monitor:

- a) Funds dispersed through the CIP incentive programs so as to determine which programs are being most utilized, and use this information to adjust the programs, as required;
- b) Feedback from applicants to the incentive programs so that adjustments can be made to the incentive programs, as required; and,
- c) The economic impact associated with projects taking advantage of the CIP incentives programs.

This CIP is not intended to be a static planning document. It is intended to be a proactive plan for economic and community renewal and revitalization in the Project Area. Therefore, information obtained through the Monitoring Program should be used by the City to periodically adjust the incentive programs to make them even more relevant and user friendly. Information collected through the Monitoring Program should be utilized to provide regular reports to Council on the amount of private sector investment being leveraged by the municipal incentive programs and the economic benefits associated with these private sector projects.

10.2 Description

Monitoring of the uptake and performance of the incentive programs should be done on a regular basis and these monitoring results reported to Council annually. As well, feedback from users of the incentive programs should be considered and utilized to adjust the incentive programs in order to improve their effectiveness and ensure that the incentive programs are effective for a range of project types and sizes in the community improvement project area. Similarly, monitoring of progress on implementation of the recommended initiatives in the DTP should be done regularly and reported to Council on a regular basis.

Table 2 presents a list of the variables that should be monitored on an individual project and aggregate basis for the incentive programs contained in this CIP. In addition to these quantitative economic measures, the City should also attempt to monitor the qualitative results of the CIP in terms of its social and community benefits. This could include the impact of community improvement, infill and redevelopment projects on existing businesses and properties in the Project Area. Regular qualitative observations should be conducted by City staff of the individual and cumulative impact of projects spurred by the CIP on the Project Area. This could include comments received by City staff and the Downtown Orillia Management Board from individual business owners, property owners, investors and residents. These qualitative measures should be regularly monitored and reported to Council along with the quantitative measures specified in Table 2.

Table 2 Monitoring Variables

Program	Monitoring Variable
1. Feasibility/Design Study Grant Program	• Number of applications; • Type of study • \$ amount of grant; • Total cost of design study/drawings; • Number of Study Grants leading to facade/construction projects; • Number and \$ amount of program defaults.
2. Facade Improvement Grant Program	• Number of applications by type of facade improvement (front/side/rear); • \$ amount of grant; • Type and cost (\$) of total facade improvements; • Total value (\$) of other building improvements/construction; • Increase in assessed value of participating property; • Increase in municipal and education property taxes of participating property; • Number and \$ amount of grant/loan defaults.
3. Building Improvement Grant Program	• Number of applications by type (interior and/or exterior building improvement) • \$ amount of grant; • Type and cost (\$) of total interior and exterior building improvements; • Total \$ value of construction; • Number of residential units by type and square footage of residential space converted, rehabilitated or constructed; • Square footage of commercial and institutional space rehabilitated and/or added; • Number of new businesses successfully occupying the space (1 year post project completion); • Increase in assessed value of participating properties; • Increase in municipal and education property taxes of participating properties; • Number and net \$ amount of grant defaults.
4. Residential Grant Program	• Number of applications by type (conversion, intensification, infill) • \$ amount of grant; • Total \$ value of construction; • Number of residential units created by type (rental/ownership, 1 bedroom, 2 bedroom, 2+ bedroom) and square footage of residential space rehabilitated, converted or added; • Rental rates/sales price; • Increase in assessed value of participating properties; • Increase in municipal and education property taxes of participating property; • Number and net \$ amount of grant defaults.
5. Brownfields Tax Assistance Program	• Number of applications; • Increase in assessed value of participating properties; • Estimated and actual amount of municipal and education tax assistance provided; • Amount of land remediated and redeveloped; • Industrial/commercial space (sq.ft.) rehabilitated or constructed; • Residential units/sq.ft. rehabilitated or constructed ; • \$ Value of private sector investment leveraged; • Jobs created/maintained; • Number and \$ amount of program defaults.

Program	Monitoring Variable
6. Tax Increment Grant Program	• Number of applications by type (conversion, intensification, infill) • % of Tax Increment • \$ amount of grant; • Total \$ value of construction; • Number of residential units by type and square footage of residential space converted, rehabilitated or constructed; • Square footage of commercial and institutional space rehabilitated or constructed; • Number of new businesses successfully occupying space (1 year post completion); • Jobs created/maintained; • Increase in assessed value of participating property; • Increase in municipal and education property taxes of participating property; • Number and \$ amount of program defaults.
7. Development Charge Grant Program	• Number of applications by type (conversion, intensification, infill) • % of Development Charge • \$ amount of Development Charge grant; • Total \$ value of construction; • Number of residential units by type and square footage of residential space converted, rehabilitated or constructed; • Square footage of commercial and institutional space rehabilitated or constructed; • Number of new businesses successfully occupying space (1 year post completion); • Jobs created/maintained; • Increase in assessed value of participating property; • Increase in municipal and education property taxes of participating property; • Number and \$ amount of program defaults.
8. Fees Grant Program	• Number, type and \$ amount of planning application fees grant • Number and \$ value of demolition and building permit fees grant • Square footage of habitable floor space created; • Square footage of commercial space rehabilitated or constructed; • Total \$ value of construction; • \$ value of building permit fees paid; and • \$ value of building permits issued.

10.3 Program Adjustments

The individual incentive programs contained in this CIP can be activated, deactivated or discontinued by Council without amendment to this Plan. Increases in funding provided by the financial incentives contained in this CIP, the addition of any new incentive programs to this CIP, or an expansion of the Community Improvement Project Area will require a formal amendment to this Plan in accordance with Section 28 of the *Planning Act*. The City may periodically review and adjust the terms and requirements of any of the programs contained in this Plan, without amendment to the Plan. Such minor changes or discontinuation of programs will be provided to the Minister of Municipal Affairs and Housing for information purposes only.

11.0 MARKETING STRATEGY

11.1 Key Objectives and Messages

It is very important to the successful implementation of this CIP that the City's incentive programs and the leadership role being taken by the City through implementation of the DTP and other key initiatives be effectively communicated to property owners, business owners, developers, potential end users, and residents within the Project Area, within the rest of the City, and beyond. The purpose of this Marketing Strategy is to proactively and regularly educate, advertise and market the City's incentive programs and the planned improvements being taken by the City to actively support revitalization within the Community Improvement Project Area.

Furthermore, experience in other municipalities with successful downtown and commercial area CIPs suggests that the downtown business improvement associations and organizations have an important and proactive role to play in assisting with education and marketing of incentive programs and other initiatives contained in a CIP to property owners, business owners and developers. Therefore, it is recommended that City partner with the Downtown Orillia Management Board to extensively and aggressively market the CIP programs. As the Downtown Orillia Management Board currently administers the existing Façade Improvement Grant and Heritage Signboard Grant, due consideration should be given by the City to the role that the Downtown Orillia Management Board could play in administering one or more of the incentive programs contained in this CIP, subject to the statutory limitations set out in Section 28 of the *Planning Act*.

It is recommended that the City budget for and implement a Marketing Strategy that:

- a) Provides direction on how to obtain information on available incentive programs, including program guides and application forms, as well as assistance and advice from City staff on making application for the incentive programs;
- b) Informs property, business owners and developers with regard to actions planned by the City to improve the investment environment and conditions within the Project Area; and,
- c) Publicizes recent development and business activity and success stories within the Project Area in order to further bolster the image of the area as both a place to invest and a place to live.

11.2 Target Audience

The long-term success of the CIP will depend on investment from both within (existing property and business owners) and outside the Project Area. Therefore, it is important to market to both these target audiences. However, the best ambassadors (marketers) for the Project Area are the business and property owners and residents already located in the area and those shopping in the area. The impact of what existing business and property owners and residents tell potential investors and business owners cannot be underestimated. Therefore, it will be very important for the City to regularly reach out to these groups using the marketing tools described below and inform them about available incentive programs, planned public realm improvements, ongoing and planned revitalization and development projects, and other attractors to the Project Area such as festivals and events.

The Marketing Strategy should be targeted to:

- a) Existing property owners and business owners in the Project Area, including all members of the Downtown Orillia Management Board;
- b) Business owners outside the Project Area, especially those with specialty retail shops, both within and outside the City, including members of the Chamber of Commerce;
- c) Business associations outside the Project Area;
- d) Support professionals, including real estate professionals, lending institutions such as banks and trust companies, planning consultants, architects, lawyers, and others; and,
- e) Residents within and outside the Project Area, as well as the general public.

11.3 Marketing Tools

The marketing of the CIP incentive programs and DTP initiatives should be a comprehensive multi-media campaign containing information, education and advertising components. The following key tools are recommended to implement the Marketing Strategy:

- a) An online and hardcopy brochure outlining the CIP initiative and financial incentive programs available from the City, including information on program requirements and how to apply;
- b) Inclusion of this brochure in the City's annual property tax billing for all properties within the Project Area;
- c) Provision of this brochure to all business owners within the Project Area;
- d) A regular newsletter (e.g., annually or semi-annually) containing a description of the financial incentive programs, highlights of public realm improvements (planned, underway, and completed) associated with the DTP, and updates and profiles of projects and new/expanded businesses that take advantage of the CIP incentive programs;
- e) Profiling of the incentive programs and downtown revitalization success stories in planning and economic development publications, newsletters and other publications published by the City;
- f) Addition to the City's web page via addition of direct (one-click) access to information on the available incentive programs and the aforementioned brochure and newsletter;
- g) Periodic presentations/sessions with property and business owners and support professionals wishing to apply for the incentive programs to outline available incentives and how to apply, City activities/ public realm improvements, and business and redevelopment success stories in the Project Area;
- h) Stories in local media (newspaper, radio, web) on the CIP, public realm improvements and community improvement success stories in the Project Area;
- i) Media Releases and profiles of successful projects and initiatives should be sent to local and outside media; and,
- j) Requiring recipients of CIP grants to post a sign (supplied by the City) that indicates that the project is taking advantage of the City's CIP incentive programs.

12.0 IMPLEMENTATION STRATEGY

12.1 Basis

Sections 28(3), 28(6) and 28(7) of the *Planning Act* identify that once a Community Improvement Project Area has been designated and a CIP is approved, a municipality may undertake a number of different actions, including:

- 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 community improvement plan;
- c) Sell, lease, or otherwise dispose of any land and buildings acquired or held by it in conformity with the community improvement plan; and,
- d) Making grants or loans to registered owners, assessed owners and tenants of lands and buildings within the community improvement project area.

Once this CIP is adopted and approved, the City of Orillia may engage in any of these activities and use its powers under the *Municipal Act, 2001* to undertake all of the recommendations in this CIP, including the financial incentive programs.

12.2 Purpose

The purpose of the Implementation Strategy (see **Table 3**) is to provide a summary “action plan” for implementing the recommendations within the CIP, including the priority and timing of these recommended actions. The Implementation Strategy also specifies the key stakeholders who will be involved in implementation of each action.

12.3 Priorities

The priorities assigned to the recommendations reflect the guiding principle that those recommendations that will have the most significant positive impact should be highest priority. The priority and timing framework in Table 3 is intended only as a general guide, and may be adjusted over time depending on budget considerations and other factors impacting the Project Area.

Table 3 Implementation Strategy

Action	Stakeholder Involvement	Priority	Timing		
			Short Term (0-2 years)	Medium Term (2-5 years)	Long Term (5+ years)
1. Implement Feasibility/Design Study Grant Program	➤ City ➤ Downtown Orillia Management Board ➤ Property/Business owners	High			
2. Implement Façade Improvement Grant Program	➤ City ➤ Downtown Orillia Management Board ➤ Property/Business owners	Very High			
3. Implement Building Improvement Grant Program	➤ City ➤ Downtown Orillia Management Board ➤ Property/Business owners	Very High			
4. Implement Residential Grant Program	➤ City ➤ Downtown Orillia Management Board ➤ Property owners	Very High			
5. Implement Brownfields Tax Assistance Program	➤ City ➤ Downtown Orillia Management Board ➤ Property owners	Medium			
6. Implement Tax Increment Grant Program	➤ City ➤ Downtown Orillia Management Board ➤ Property owners	High			
7. Implement Development Charge Grant Program	➤ City ➤ Downtown Orillia Management Board ➤ Property owners	High			
8. Implement Fees Grant Program	➤ City ➤ Downtown Orillia Management Board ➤ Property/Business owners	High			
9. Prepare Program Guides, Application Forms and other Incentive Program Implementation Materials	➤ City	Very High			

Action	Stakeholder Involvement	Priority	Timing		
			Short Term (0-2 years)	Medium Term (2-5 years)	Long Term (5+ years)
10. Implement Marketing Strategy	➤ City ➤ Downtown Orillia Management Board ➤ Chamber of Commerce	(see below)			
a. Install direct one click access to incentive program information on City's website	➤ City	Very High			
b. Prepare Incentive Program Brochure	➤ City ➤ Downtown Orillia Management Board	Very High			
c. Include Incentive Program Brochure in property tax billing for all properties in Project Area	➤ City				
d. Distribute Incentive Program Brochure to business owners in Project Area	➤ City ➤ Downtown Orillia Management Board				
e. Prepare and disseminate Regular Newsletter	➤ City ➤ Downtown Orillia Management Board ➤ Chamber of Commerce	High			
f. Profile incentive programs and success stories in Economic Development and other City publications	➤ City	Medium			
g. Conduct presentations with property/ business owners/support professionals	➤ City ➤ Downtown Orillia Management Board ➤ Property/business owners ➤ Support professionals	High			
h. Promote stories in local media on CIP and community improvement success stories.	➤ City				
h. Issue media releases on incentive programs and participating projects	➤ City ➤ Downtown Orillia Management Board	Medium			
i. Require grant recipients to post sign	➤ City ➤ Downtown Orillia Management Board	Very High			

13.0 CONCLUSION

This CIP is designed to help to generate the very types of community improvement specified in the long-term Vision, Goals and Strategic Master Plan in the DTP. The CIP and the DTP share a symbiotic and mutually reinforcing relationship, and that is by design.

The incentive programs contained in this CIP have been developed specifically to address the key community improvement needs in the Project Area. The preparation of this CIP has benefitted greatly from community consultation through input provided by the Project Review Team, as well as input from property and business owners, residents and other stakeholders at the public information and workshop sessions, and from Council.

The adoption and approval of this CIP will provide the legislative basis and comprehensive policy framework to guide the municipal incentive programs and other actions needed to achieve the Vision of the Downtown Tomorrow Plan for Downtown Orillia. Successful implementation of this CIP will require a commitment by Council to funding for implementation of the incentive programs as well as a financial and staffing resource commitment to implement, administer, market and monitor the incentive programs.

Experience in other municipalities has shown that early and effective implementation of the Marketing Strategy will help to make property and business owners in the Project Area aware of the City's plans for the area and the available incentive program opportunities. This will result in a more successful CIP. Ongoing monitoring of the performance of the incentive programs and adjustment of the programs as required will also help to ensure the effectiveness of this CIP.

Appendix A

City of Orillia Official Plan – Community Improvement Policies

7.4 COMMUNITY IMPROVEMENT POLICIES

7.4.1 INTENT

- a) The Community Improvement provisions of the *Planning Act* allow municipalities to prepare community improvement plans for designated community improvement project areas that require community improvement as the result of age, dilapidation, overcrowding, faulty arrangement, unsuitability of buildings or for any other environmental, social or community economic development reason.
- b) The purpose of the Community Improvement policies in this Plan is to provide a comprehensive framework for the designation of community improvement project areas and the preparation, adoption and implementation of community improvement plans by the City that promote the maintenance, rehabilitation, redevelopment and revitalization of the physical, social and economic environment in the municipality.
- c) The City will encourage the community to become actively involved in Community Improvement Plans and projects. The public will be consulted during the process of developing Community Improvement Plans and consultation with businesses and residents will be undertaken.

7.4.2 GOALS

- a) The goals of community improvement are to:
 - i) preserve, rehabilitate and redevelop the existing built environment;
 - ii) maximize the use of existing public infrastructure, facilities and amenities;
 - iii) coordinate private and public community improvement activities;
 - iv) promote development and redevelopment that is sustainable in nature;
 - v) guide the City in setting priorities for municipal expenditure respecting community improvement projects;

- vi) participate, wherever possible, in Federal and/or Provincial programs to facilitate community improvement; and,
- vii) reconcile existing land use conflicts and minimize future land use conflicts.

7.4.3 COMMUNITY IMPROVEMENT PLANS

- a) Community Improvement Plans may be prepared and adopted by the City to achieve one or more of the following objectives:
 - i) encourage the renovation, repair, rehabilitation, redevelopment or other improvement of lands and/or buildings, including environmental remediation, development, redevelopment, construction and reconstruction of lands and buildings for rehabilitation purposes, or for the provision of energy efficient uses, buildings, structures, works, improvements or facilities;
 - ii) encourage the preservation, restoration, adaptive reuse, maintenance and improvement of designated heritage buildings/properties and other historically or architecturally significant buildings/properties;
 - iii) encourage the preservation and enhancement of existing commercial areas through the stimulation of private sector investment, especially in Downtown Orillia;
 - iv) maintain and improve the physical and aesthetic qualities and amenities of streetscapes, especially in Downtown Orillia;
 - v) encourage maximum use of existing public infrastructure through the infilling, intensification and redevelopment of lands and buildings which are already serviced with municipal services;
 - vi) maintain and improve municipal services including water distribution, sanitary sewers, stormwater management, roads, sidewalks, and street lighting;
 - vii) maintain and improve the transportation network to ensure adequate traffic flow, pedestrian circulation and parking facilities, especially in Downtown Orillia;

- viii) encourage the restoration, maintenance, improvement and protection of natural habitat, parks, open space, recreational and heritage facilities and amenities;
- ix) encourage the development of an adequate supply of affordable housing which meets the needs of local residents;
- x) encourage the eventual elimination and/or relocation of incompatible land uses, and where this is not feasible, encourage physical improvements to minimize the incompatibility;
- xi) encourage community improvement activities which contribute to a strong economic base including commercial, industrial, recreational and tourism activity and job creation;
- xii) promote and encourage the rehabilitation, re-use and redevelopment of brownfield sites;
- xiii) improve environmental conditions;
- xiv) improve social conditions;
- xv) promote cultural and tourism development;
- xvi) facilitate and promote community economic development; and,
- xvii) improve community quality, safety and stability.

7.4.4 DESIGNATION OF COMMUNITY IMPROVEMENT PROJECT AREA(S)

- a) Council may designate by by-law one or more Community Improvement Project Area(s), the boundary of which may be part or all of the municipality.
- b) For an area to be designated as a Community Improvement Project Area, it must satisfy at least one, and preferably more than one of the following general criteria:
 - i) deficiencies or deterioration of physical infrastructure including but not limited to the sanitary sewers, storm sewer system, watermains, roads, sidewalks, curbs, street lighting, street furniture, municipal and private parking and loading facilities;

- ii) deficiencies or deterioration in the level of community and recreation facilities such as public open space, parks, community centres, libraries, arenas, gymnasiums, ball diamonds and similar types of facilities;
- iii) buildings, building facades, and/or property, in need of maintenance, preservation, restoration, repair, rehabilitation, energy efficiency or renewable energy improvements, or redevelopment;
- iv) presence of buildings and/or lands of architectural or heritage significance;
- v) commercial and mixed use areas with high vacancy rates and/or poor overall visual quality of the built environment, including but not limited to, building facades, streetscapes, public amenity areas and urban design, especially such areas that form part of a Business Improvement Area;
- vi) vacant lots and/or underutilized properties and buildings which have potential for infill, intensification or redevelopment to better utilize the land base, particularly where there is the potential for mixed use development or the introduction of additional residential units;
- vii) non-conforming, conflicting, encroaching or incompatible land uses or activities that result in conflicts that threaten to disrupt the predominant land use and/or economic function of the area;
- viii) demonstrated problem or deficiency associated with the circulation and/or access of traffic;
- ix) human-made hazards which should be eliminated in order to ensure a greater degree of public safety and to further enhance the community function;
- x) a shortage of land to accommodate widening of existing rights-of-way, building expansion, parking and/or loading facilities;
- xi) inadequate outside storage facilities;
- xii) flood prone area;

- xiii) known or suspected environmental contamination;
 - xiv) other significant barriers to the repair, rehabilitation or redevelopment of underutilized land and/or buildings; and,
 - xv) other significant environmental, social or community economic development reasons for community improvement.
- c) Priority for the designation of Community Improvement Project Areas and the preparation and adoption of Community Improvement Plans shall be given to:
 - i) Downtown Orillia;
 - ii) those areas where the greatest number of criteria for selection of Community Improvement Project Areas are present; and/or,
 - iii) those areas where one or more of the criteria for selection of Community Improvement Project Areas is particularly acute; and/or,
 - iv) those areas where one or more of the criteria for selection of Community Improvement Project Areas exists across the municipality or large part of the municipality.
- d) The phasing of community improvements shall be prioritized to:
 - i) permit a logical sequence of improvements to occur without unnecessary hardship on area residents and the business community;
 - ii) reflect the financial capability of the City to fund community improvement projects;
 - iii) implement those improvements that will most substantially improve the aesthetic, environmental and service qualities of a community improvement project area;
 - iv) take advantage of available senior government programs that offer financial assistance for community improvement efforts; and,
 - v) coordinate the timing of related capital expenditures from various municipal departments with departmental priorities.

7.4.5

IMPLEMENTATION OF COMMUNITY IMPROVEMENT PLAN(S)

- a) In order to implement a Community Improvement Plan in effect within a designated Community Improvement Project Area, the City may undertake a range of actions, including:
 - i) the municipal acquisition of land and/or buildings and the subsequent;
 - a) clearance, grading, or environmental remediation of these lands and properties;
 - b) repair, rehabilitation, construction or improvement of these properties;
 - c) sale, lease, or other disposition of these properties to any person or governmental authority;
 - d) other preparation of land or buildings for community improvement.
 - ii) provision of public funds such as grants and loans to owners of land and their assignees;
 - iii) programs and measures to promote energy efficient development, redevelopment and retrofit projects;
 - iv) provision of information on municipal initiatives, financial assistance programs, and other government assistance programs;
 - v) coordination of public and private redevelopment and rehabilitation by providing administrative and liaison assistance;
 - vi) application for financial assistance from and participation in senior level government programs that provide assistance to municipalities and/or private landowners for the purposes of community improvement;
 - vii) agreements with any government authority or agency for the preparation of studies, plans and programs for the development or improvement of a Community Improvement Project Area;

- viii) discussions and negotiations with owners of properties which are substandard with respect to maintenance, and if such discussions and negotiations are unsuccessful, enforcement of the Municipality's Property Standards By-Law;
 - ix) support of the preservation and restoration of historic and/or architecturally significant buildings and districts through the Ontario *Heritage Act, 1990*, in accordance with policies in Section 5.5 of this Plan, and the use of funding programs under that Act;
 - x) continued support of existing Business Improvement Areas, and the encouragement of the establishment of new Business Improvement Areas and the expansion of existing Business Improvement Areas in an effort to maintain strong and vital commercial areas;
 - xi) support for and co-operation with local service clubs and other organizations in the development of recreation and other facilities and services in a Community Improvement Project Area; and,
 - xii) continued enforcement of the City's Zoning By-law, Property Standards By-law, Sign By-law, and other related municipal by-laws and policies.
- b) All developments participating in programs and activities contained within Community Improvement Plans shall conform with the policies contained in this Plan, the Zoning-By-law, Property Standards By-law, and all other related municipal policies and by-laws.
 - c) Council shall adopt such special measures as may be necessary to implement the goals and objectives for Community Improvement.

Appendix B

Public Information Session and Workshop #1 Consultation Summary

Consultation Summary
Orillia Downtown Tomorrow Community Improvement Plan
Information Session & Workshop #1, July 14, 2015

Question	Group 1	Group 2	Group 3	Group 4	Group 5
1. Most important community improvement needs in Downtown Orillia?	• More people living Downtown with more disposable income and spending • Engaged residents who live, work and spend in Downtown • More services and retail to support new residents, e.g., grocery store, deli • Pedestrian friendly infrastructure (sidewalks, paths, bike racks, alleys) • Pedestrian oriented open spaces and market areas • A public “celebration space” for festivals and gatherings • Better wayfinding signage from parking lots to main streets/shopping area • Better connections to secondary streets such as Colborne • More parking to accommodate new residents • Good alternative transit options to support new residents • Consistent and extended store hours	• More people living Downtown • Connect Downtown to Waterfront • Improve Waterfront • Improve brownfield sites • Façade improvement, especially side and rear facades • Abandoned and derelict buildings • More affordable housing • More jobs Downtown • More upscale development • More tourists • Reduce absentee landlords • Longer store hours of operation, especially in evening • Stronger visual identity through signage • Shared urban squares	• More people • Better lake views • Better public areas/spaces with seating • Improved sidewalks, roads and public spaces • Repair and renovate derelict sites • Redevelop vacant sites • Free parking • More parking for residents • Better wayfinding signage • People space on Waterfront such as bike racks/rentals, canoe/kayak racks/rentals	• More younger people (19-30) Downtown to live/work/play • Development that better connects Downtown and Waterfront (consistent feel) • More parking (underground?) • Improve accessibility • Restore and enhance view scapes • Better wayfinding signage • Better branding	• More people living Downtown • Restore derelict buildings • Redevelop brownfield sites • Repair and improve deteriorated Downtown sidewalks • Building improvements along Colborne and Coldwater Streets • Urban squares and parkettes • Better municipal parking signage
2. Most significant opportunities for and desired types of community improvement in Downtown Orillia?	• Pedestrian and bike friendly development • Rooftop patios and cafes	• Vacant properties present significant opportunities • Development for and marketing to retirees • Waterfront hotels and restaurants • Year round market showcasing local foods, crafts and arts • Partnerships with local educational institutions in the Downtown, e.g., target design schools, cooking schools, etc... to locate Downtown	• Residential condominiums • Rehabilitate and reuse upper stories of building for residential and offices • Redevelopment of derelict properties • Restaurant and retail development at Waterfront • Opportunity for City to buy and sell land • Pre-zoning of sites and remove barriers to development	• Restore existing vacant housing stock and build new residential units • Opportunities for light industrial in Hospital District and Barrie Road areas • Partnerships with local educational institutions and business sector to stimulate employment	• Underutilized and vacant sites provide opportunities for apartment residential • Public realm improvement on the Waterfront • Use new Recreation Centre project as a “catalytic project” • Formal meeting place, e.g. Library Square

Consultation Summary (Cont'd)
Orillia Downtown Tomorrow Community Improvement Plan
Information Session & Workshop #1, July 14, 2015

Question	Group 1	Group 2	Group 3	Group 4	Group 5
3. Types of financial incentives that would work best in Downtown Orillia?	• Façade improvement grant/loan • Building retrofit/rehabilitation grant/loan • Initial design/marketing study grant • Tax increment grants that are performance based • Grant/loan for landscaping/property beautification • Incentives should target specific uses and services needed in the Downtown • Incentives should promote collaborative uses through partnerships and shared space, e.g., business incubator • Incentives for development that provides community/gathering/entertainments space • Incentives for development that attract visitors in shoulder area/off season • Make sure incentive programs are properly evaluated to determine ROI	• Tax increment grants • Incentives for affordable housing • Targeted incentives for specific uses, e.g., mixed use • Grants for signage upgrading • Reduced development charges	• Development charge reduction • Scalable grants • Sizable loan limits • Incentive programs should be stackable • Incentives for study area outside commercial core important	• Tax increments grants • Grants/loans to repurpose upper floors for uses such as residential, office, etc... • Affordable housing grant/loan • Education and marketing important for all incentives to be put in place	• Façade improvement grants/loans for both heritage and non-heritage • Signage grant – revisit funding formula • Development charge reduction • Ensure façade and signage sensitive to heritage – use design guidelines
4. Other key ideas/suggestions for community improvement in Downtown Orillia?	• Expand affordable parking • More reliable and frequent public transit • Electric car/shared car opportunities • Bike sharing	• Eliminate paid parking • Better links to Downtown from other areas • Build Orillia's identity as a recreational and cultural hub • Promote active transportation • Partnerships with local educational institutions in the Downtown • A boater's directory and pamphlet	• Reduce red tape/barriers to development • Enhance links between Downtown and Waterfront	• Promote active transportation • Updated transit hub that does not cause intersection congestion	• Streamline development approvals process

Appendix C

Public Information Session and Workshop #2 Consultation Summary

Consultation Summary
Orillia Downtown Tomorrow Community Improvement Plan
Information Session & Workshop #2, October 27, 2015

Question	Group 1	Group 2
1. Do you have any comments on the Design Principles and Guidelines?	• Ensure consistency of design principles with Sign By-law. • Accessibility needs are very important, especially in main street area. • Balance “accessibility” versus “spill out space”. • Some concern re: transparent ground floor facades. • Rear facades are very important, as are alleyways and pedestrian linkages.	• How does heritage theme apply to new development? Would like to see heritage theme incorporated as a design component of new construction for purposes of continuity. • Design principles/guidelines should encourage: i) active transportation, including pedestrian friendly design, e.g., wider sidewalks/boulevards for public space use such as bike racks/lanes and patios; ii) parking at rear of buildings to keep building frontage vibrant and active; and, iii) well-lit alleyways to encourage parking off the street. • Design Principles 1 (existing heritage buildings restored to reveal original character and features) and 2 (new building styles complementary to existing traditional building stock) are most important..

Consultation Summary (Cont'd)
Orillia Downtown Tomorrow Community Improvement Plan
Information Session & Workshop #2, October 27, 2015

Question	Group 1	Group 2
2. Which of the proposed incentive programs do you think are most important? (Rank the Top 4 most important programs)	• Important to implement <u>all</u> incentive programs because having whole suite of programs is critical – no one program can achieve overall success. • Need all the incentive programs, but those that will encourage people to live Downtown are the most important. • Residential Grant Program is very important to better utilize existing building stock. • Toolbox approach with incentive programs widens Downtown demographic potential for upper storey apartments in existing buildings and new condominiums – a different demographic. • Incentive programs that repurpose former industrial buildings and underutilized buildings are important. • Incentive programs that facilitate live-work space/opportunities are important. • Maintaining “stackability” of the incentive programs is important.	• Incentive Program for rear and side façade improvement is very important. • Ranking of Top Incentive Programs: 1. Façade and Building Improvement Grant Programs (2 programs) 2. Residential Grant Program 3. Brownfields Tax Assistance Program 4. Development Charge Grant Program 5. Fees Grant Program • Ranking of programs from 2 to 5 is very close.

Consultation Summary (Cont'd)
Orillia Downtown Tomorrow Community Improvement Plan
Information Session & Workshop #2, October 27, 2015

Question	Group 1	Group 2
3. What changes or additions to the proposed incentive programs would you like to see?	The smaller incentive programs should be available year round.	- Recommend adding an incentive program for property owners who seek/achieve heritage designation (to offset costs related to maintenance of heritage features). - Recommend that the 30% of the tax increment collected annually through the Tax Increment Grant be set aside for heritage building improvement.
4. Other key ideas/suggestions/comments regarding community improvement in Downtown Orillia?	- The CIP (including the incentive programs) should be viewed as an "investment" and not an "expenditure" – Council and the public need to understand this. - Two kinds of marketing of CIP need to be done: i) to property owners/developers; and, ii) to the public.	- Need to create a defined nucleus in the Downtown. - Recommend adding a fast-track stream for Downtown applications that meet the criteria. - It is very important that the Final CIP document tie in the incentive programs with the larger vision for the Downtown and Waterfront contained in the Downtown Tomorrow Plan.

Appendix D

Administration of the Feasibility/Design Study Grant Program

Step 1 Application Submission

Applicants will be required to have a pre-application consultation meeting with staff in order to determine program eligibility, proposed scope of work, and project timing, among other details. Staff may perform an initial site visit(s) and inspection(s) of the building/property (as necessary).

Before accepting an application, staff will screen the proposal and application. If the application is not within the Community Improvement Project Area, or the application clearly does not meet the program eligibility criteria, the application will not be accepted. If staff determines that the application is not acceptable for one or more of the above noted reasons, the application will be returned to the applicant with a letter explaining the reason for not accepting the application. Acceptance of the application by the City in no way implies program approval.

Applications will include:

- a) a work plan and cost estimate for the feasibility study, design study and/or architectural/design drawings, prepared by a qualified professional as determined by the City; and,
- b) a description of the planned redevelopment, including reference to any planning applications that have been submitted/approved.

Step 2 Application Review and Evaluation

Applications and supporting materials will be reviewed by staff against program requirements. Staff will determine the eligible works and costs. A recommendation report will be prepared by staff.

All studies and architectural/design drawings approved under this grant program shall be completed by a qualified professional as determined by the City. All completed design studies and architectural/design drawings must conform with the City's Design Principles and Guidelines, other applicable City guidelines and the description of the study/drawings as provided in the grant application form.

One (1) electronic and one (1) hard copy of the study and/or architectural/design drawings along with the original invoice indicating that the study consultants have been paid in full shall be submitted to the City for review. Applicants must agree at the time of application to provide the City with permission to provide the study and architectural/design drawings to a subsequent owner(s) of the property and interested parties should the applicant decide not to proceed with the work that is subject of the study grant.

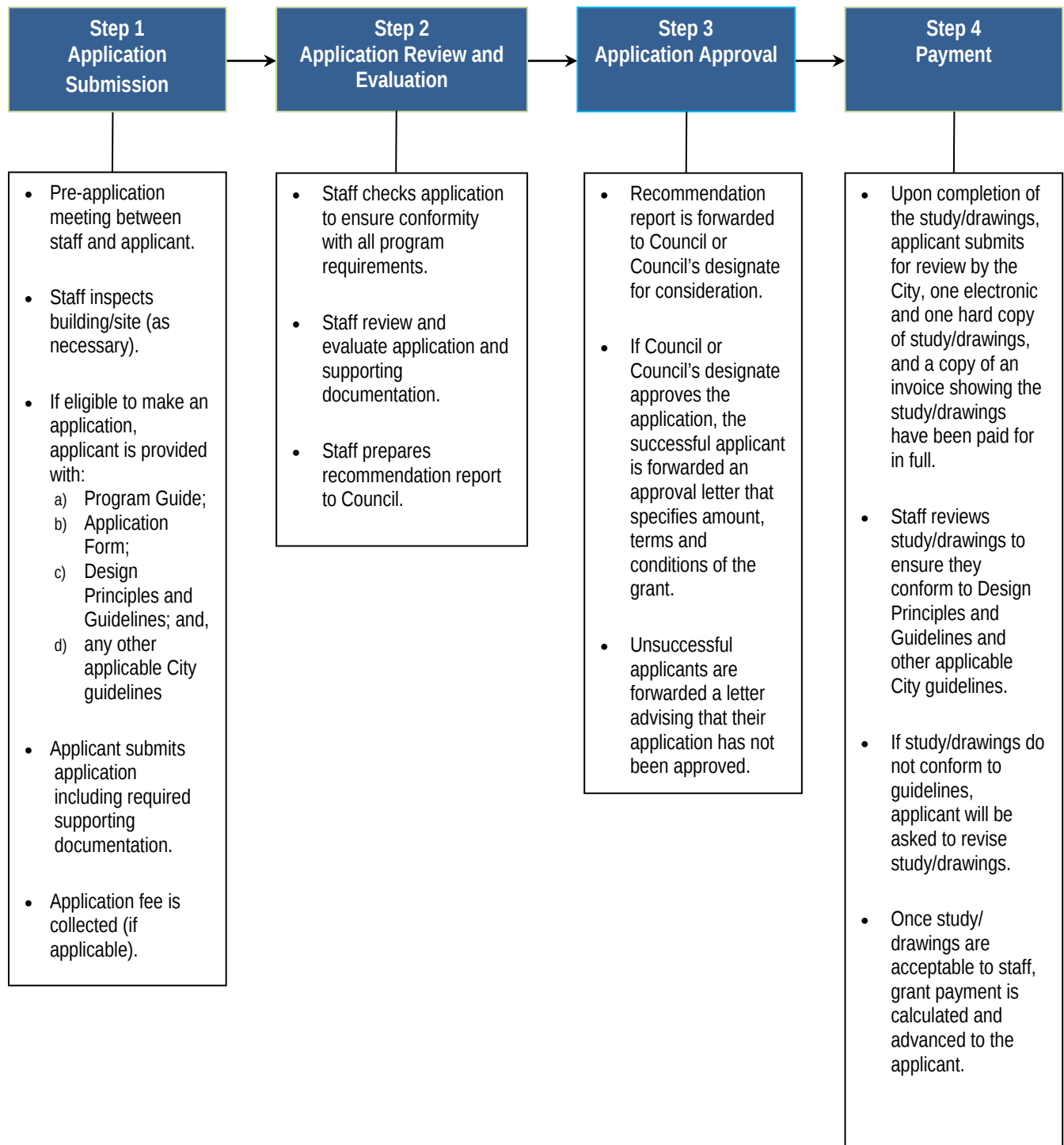
Step 3 Application Approval

The recommendation report will be forwarded to City Council or Council's designate for consideration. If Council or Council's designate approves the application, the applicant will be sent a letter that outlines the terms and conditions and the amount of the grant. If the application is not approved, the applicant will also be advised by letter. The grant amount will be based on 50% of the estimated cost of the study (excluding taxes) or 50% of the actual cost of the study (excluding taxes), whichever is less.

Step 4 Payment

Grants approved under this program will be paid to applicants following submission to the City for review of one hard copy and one electronic copy of the final completed study and/or architectural design drawings with the original invoice, indicating that the study consultants have been paid in full. The grant may be reduced or cancelled if the study/drawings are not completed, not completed as approved, or if the consultant(s) that prepared the study/drawings has not been paid.

Figure D-1 Administration of the Feasibility/Design Study Grant Program



Appendix E

Administration of the Façade Improvement Grant, Building Improvement Grant, and Residential Grant Programs

Step 1 Application Submission

Applicants will be required to have a pre-application consultation meeting with staff in order to determine program eligibility, proposed scope of work, and project timing, among other details. Staff will perform an initial site visit(s) and inspection(s) of the building/property, as necessary.

Before accepting an application, staff will screen the proposal and application. If the application is not within the Community Improvement Project Area, or the application clearly does not meet the program eligibility criteria, the application will not be accepted. If staff determines that the application is not acceptable for one or more of the above noted reasons, the application will be returned to the applicant with a letter explaining the reason for not accepting the application. Acceptance of the application by the City in no way implies program approval.

The City may accept applications all year round for this program or the City may issue a Request for Applications (RFA) for this program once or twice per year (or other periodic basis) depending on availability of funding and program interest.

The City may request that applications for this program be accompanied by supporting documentation, including but not necessarily limited to:

- a) electronic and printed photographs of the existing building facade;
- b) historical photographs and/or drawings;
- c) a site plan and/or professional design study/architectural drawings;
- d) specification of the proposed works, including a work plan for the improvements to be completed and construction drawings;
- e) two (2) cost estimates for eligible work provided by a licensed contractor.

If the application is approved, and the applicant elects to engage the contractor who provided the highest cost estimate, the City's grant contribution will be based on the lowest cost estimate. An application fee may be collected at the time of application.

Step 2 Application Review and Evaluation

Applications, supporting materials and documentation will be reviewed by staff against program requirements. Staff will determine the eligible works and costs.

The determination of eligible works and costs and the recommendation on the application will be guided by the City's Design Principles and Guidelines and any other applicable City guidelines, and other appropriate reference material as determined by staff.

For buildings designated under the *Ontario Heritage Act*, the facade restoration and improvement works should be supported by documentation in the form of historic photographs or drawings clearly showing the feature(s) to be restored or reconstructed.

A recommendation report will be prepared by staff. If this report recommends approval of the application, a grant agreement satisfactory to the City Solicitor will also be prepared. This agreement will contain conditions to ensure that the project is commenced and completed in a timely fashion. This agreement will be forwarded to the applicant to be dated and signed. Once the signed agreement has been returned to the City, the Council application approval process can commence.

Step 3 Application Approval

The recommendation report will be forwarded to City Council or Council's designate for consideration. If Council or Council's designate approves the application, the grant agreement will be executed (signed and dated) by City officials and a copy provided to the applicant.

Step 4 Payment

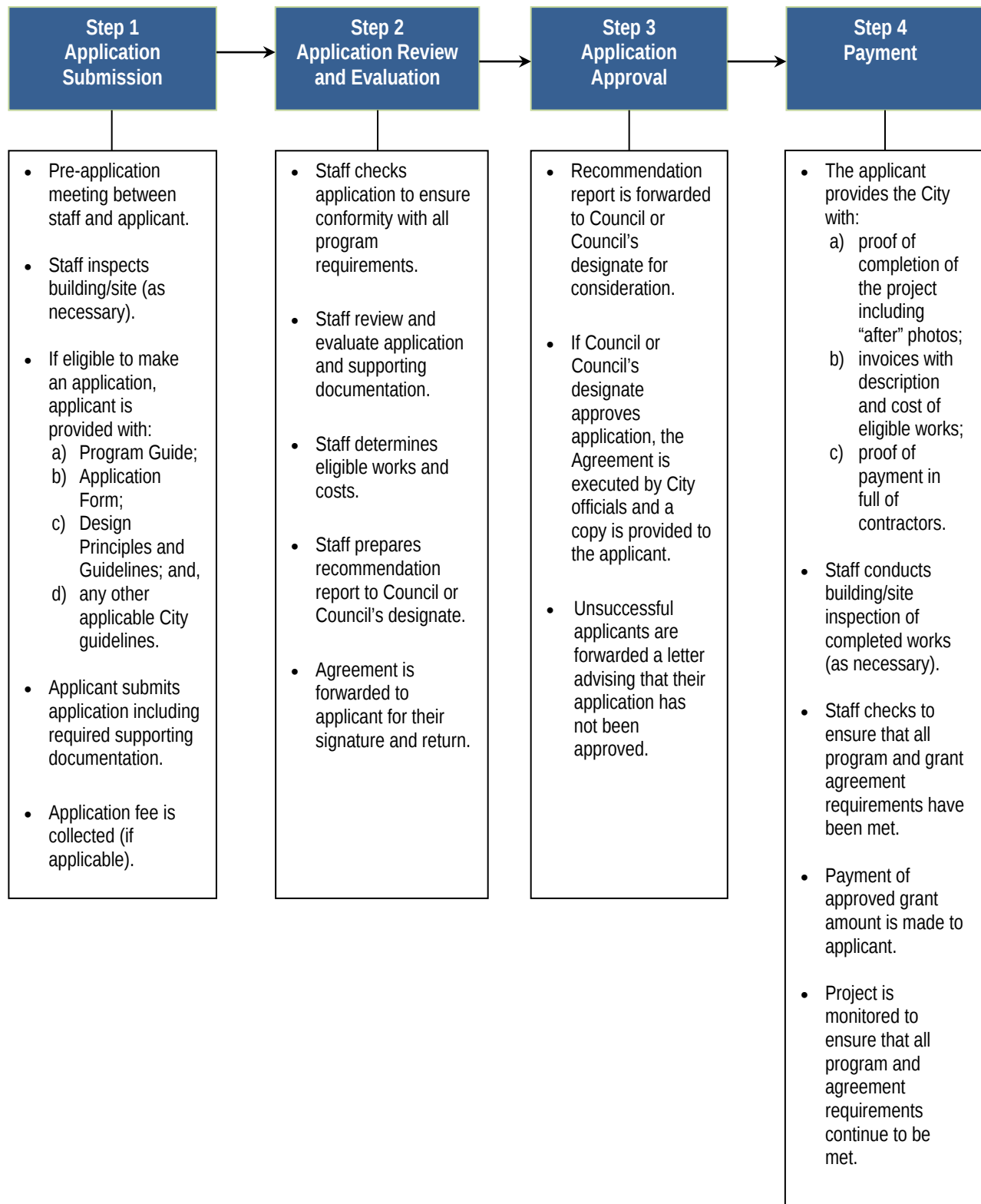
Payment of the grant shall not take place until:

- a) the grant agreement has been executed by the applicant and the City;
- b) construction of the eligible works is completed;
- c) photographic evidence of the completed works (satisfactory to the City) has been submitted;
- d) staff have inspected the completed works (as necessary) to ensure that the project has been completed in accordance with the program application and grant agreement;
- e) invoices clearly showing the amount paid for all eligible works have been submitted;
- f) written verification that all contractors have been paid in full has been provided; and,
- g) staff are satisfied with all reports and documentation submitted.

Prior to issuance of the grant payment, staff will check to ensure that all program requirements (general and program specific) and grant agreement requirements have been met. If all program requirements and grant agreement requirements have been met to the City's satisfaction, then the City will issue payment of the approved grant in conformity with the grant agreement.

Staff will monitor the project, periodically checking that the project is in compliance with the grant agreement requirements. Staff will take appropriate remedies as specified in the grant agreement if the applicant defaults on the agreement.

Figure E-1 Administration of the Facade Improvement Grant, Building Improvement Grant and Residential Grant Programs



Appendix F

Administration of the Tax Increment Grant Program

Step 1 Application Submission

Applicants will be required to have a pre-application consultation meeting with staff in order to determine program eligibility, proposed scope of work, and project timing, among other details. Staff will perform an initial site visit(s) and inspection(s) of the building/property (if necessary).

Before accepting an application, staff will screen the proposal and application. If the application is not within the Community Improvement Project Area, or the application clearly does not meet the program eligibility criteria, the application will not be accepted. If staff determine that the application is not acceptable for one or more of the above noted reasons, the application will be returned to the applicant with a letter explaining the reason for not accepting the application. Acceptance of the application by the City in no way implies program approval.

The City may request that applications for this program be accompanied by supporting documentation, including but not necessarily limited to:

- a) photographs of the existing building facade;
- b) historical photographs and/or drawings;
- c) a site plan and/or professional design study/architectural drawings;
- d) specification of the proposed works including a work plan for the improvements to be completed and construction drawings;
- e) professional design study/architectural drawings;
- f) estimated project construction costs, including a breakdown of said costs;
- g) impact studies such as traffic studies and studies of microclimatic conditions (sun, shadow, wind)
- h) environmental reports and/or a Record of Site Condition (RSC);
- i) a Business Plan; and,
- j) any other financial information.

An application fee may be collected at the time of application.

Step 2 Application Review and Evaluation

Applications and supporting materials and documentation are reviewed by staff against program requirements and applicable City guidelines. Staff will determine the eligible works and costs. The determination of eligible works and costs and the recommendation on the application will be guided by City guidelines, and other appropriate reference material as determined by staff.

For buildings designated under the *Ontario Heritage Act*, the facade restoration and building improvement works should be supported by documentation in the form of historic photographs or drawings clearly showing the feature(s) to be restored or reconstructed.

As an option, staff will utilize the actual pre-project property taxes and estimated post-project assessed value and applicable tax rates to calculate the estimated post-project property taxes, increase in City property taxes, and the estimated annual and total grant amount to be provided.

A recommendation report will be prepared by staff. If this report recommends approval of the application, a grant agreement satisfactory to the City Solicitor will also be prepared. This agreement will contain conditions to ensure that the project is commenced and completed in a timely fashion. This agreement will be forwarded to the applicant to be dated and signed. Once the signed agreement has been returned to the City, the Council application approval process can commence.

Step 3 Application Approval

The recommendation report is forwarded to Council or Council's designate for consideration. If Council or Council's designate approves the application, the agreement is executed (signed and dated) by City officials and a copy is provided to the applicant.

Step 4 Payment

Prior to payment of the grant, the applicant must provide the City with:

- a) photographic evidence of the completed project satisfactory to the City;
- b) other documentation proving completion of the project, e.g., engineer's report (if required);
- c) all final reports and documentation as required.

Staff will conduct a final building/site inspection (as necessary) to ensure that the project has been completed in accordance with the grant application and agreement.

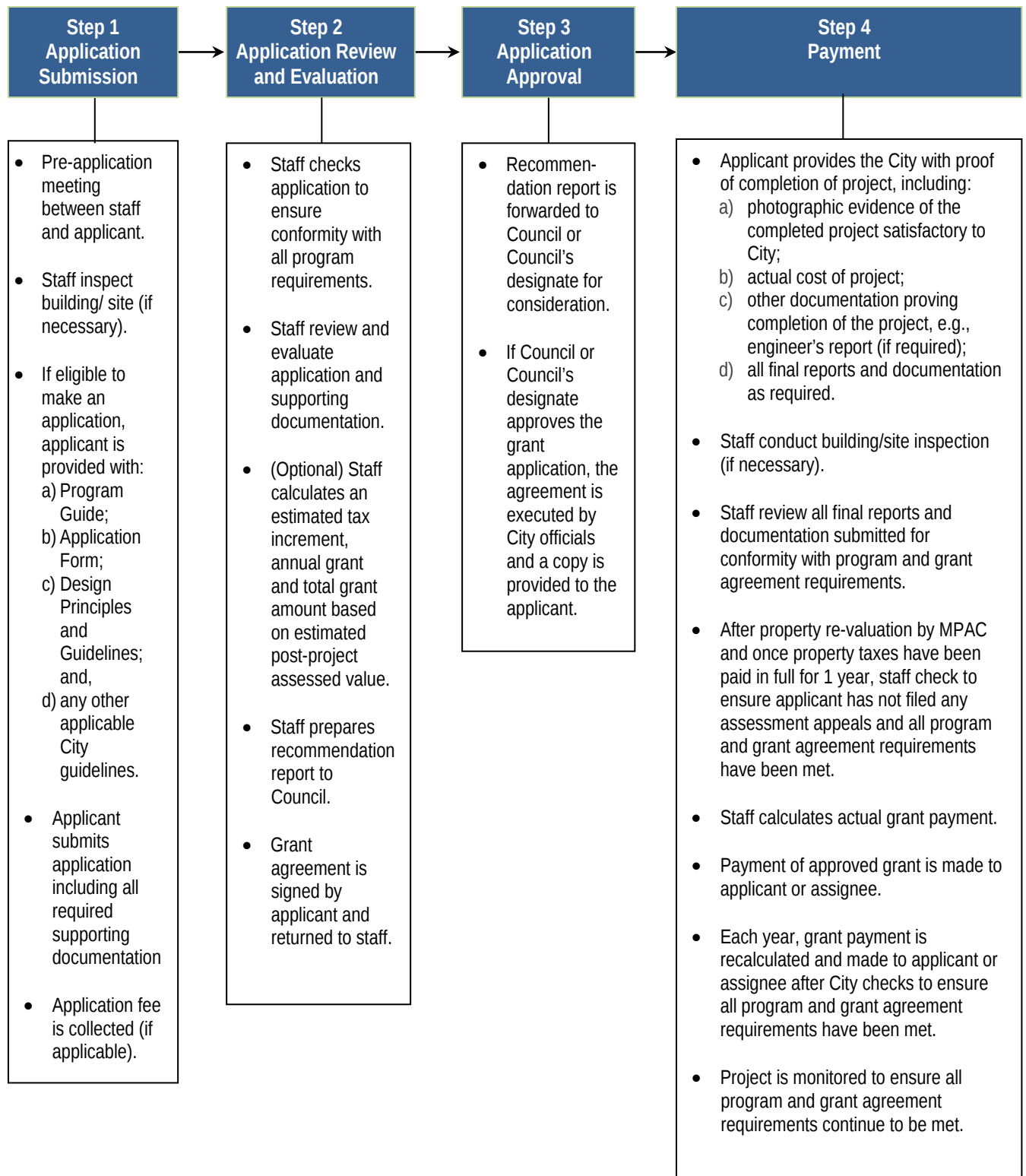
Once the project is complete, an occupancy permit has been issued, and the property has been re-valued by the Municipal Property Assessment Corporation, the property owner will be sent a new tax bill. After the property owner has paid in full the new property taxes for one (1) year, the City will check to ensure that:

- a) the applicant has not filed any assessment appeals; and,
- b) all program and grant agreement requirements have been met.

If all program and grant agreement requirements have been met to the City's satisfaction, then the City will calculate the actual tax increment and grant payment. The City will then issue payment of the grant in the form of a cheque in the amount specified as per the calculation of the actual grant payment.

Staff will monitor the project, periodically checking that the project is in compliance with all program and grant agreement requirements. City staff will take appropriate remedies as specified in the grant agreement if the applicant defaults on the agreement.

Figure F-1 Administration of the Tax Increment Grant Program



Appendix G

Administration of the Brownfields Tax Assistance Program

Step 1 Application Submission

Applicants will be required to have a pre-application consultation meeting with staff in order to determine program eligibility, proposed scope of work, and project timing. Staff will perform an initial site visit(s) and inspection(s) of the building/property (if necessary).

Before accepting an application, staff will screen the proposal and application. If the application is not within the Community Improvement Project Area, or the application clearly does not meet the program eligibility criteria, the application will not be accepted. If staff determines that the application is not acceptable for one or more of the above noted reasons, the application will be returned to the applicant with a letter explaining the reason for not accepting the application. Acceptance of the application by the City in no way implies program approval.

Applications submitted to the City shall be accompanied by a Phase II ESA and/or Remedial Work Plan and/or Risk Assessment prepared by a qualified person that identifies and details estimated eligible costs and a work plan and budget for the proposed remediation. The City may also require submission of a Business Plan for the proposed redevelopment project.

An application fee may be collected at the time of application.

Step 2 Application Review and Evaluation

Applications and supporting materials and documentation are reviewed by City staff against program requirements. City staff will determine the eligible works and costs.

The actual pre-project education and municipal property taxes and estimated post-project assessed value and applicable tax rates will be used to calculate the estimated post-project property taxes, increase in municipal property taxes, education property taxes, and the estimated maximum amount of municipal and education property tax assistance to be provided during the rehabilitation period and the development period (as defined under Section 365.1 (1) of the *Municipal Act, 2001*).

Where staff will be recommending approval of an application for Brownfields Tax Assistance, staff will prepare the following documents:

- a) A recommendation report to Council or Council's designate on the Brownfields Tax Assistance Program Application;
- b) a Brownfields Tax Assistance Program Agreement;
- c) a draft by-law to authorize municipal and education tax assistance under Section 365.1 of the *Municipal Act, 2001*; and
- d) an application to the Minister of Finance for matching education property tax assistance.

Staff will forward Items a) – d) above to the Minister of Finance. Matching education property tax assistance through the Brownfield Financial Tax Incentive Program (BFTIP), or through any other replacement programs administered by the Province is subject to approval by the Minister of

Finance. Once written approval of the by-law is received from the Minister of Finance, any conditions or restrictions specified by the Minister will be included in the by-law.

An Agreement satisfactory to the City Solicitor will be prepared. This agreement will contain conditions to ensure that the project is commenced and completed in a timely fashion. This agreement will be forwarded to the applicant for signature and returned.

Step 3 Application Approval

The Minister of Finance is currently prepared to authorize municipal applications for matching education property tax assistance for a maximum of three (3) years from the date of the passing of the by-law. Applications seeking matching education property tax assistance for a longer period are subject to approval of the Minister of Finance. The City may continue to offer municipal tax assistance up to the time period specified for municipal tax assistance in the by-law, or when the total tax assistance provided equals the total eligible costs, whichever comes first. The matching education property tax assistance may be provided on a different schedule from the tax assistance provided by the City and may be subject to different or additional conditions.

A recommendation report will be prepared by staff. The recommendation report, the Agreement (dated and signed by the applicant), and the by-law will then be forwarded to Council (or Council's designate) for consideration. If Council or Council's designate approves the application and the agreement, and adopts the by-law, the agreement will be executed by the authorized City officials and a copy will be provided to the applicant. A copy of the by-law, including all information prescribed by Ontario Regulation 274/04 will be forwarded to the Minister of Municipal Affairs and Housing and the Minister of Finance within 30 days of passing of the by-law by the City.

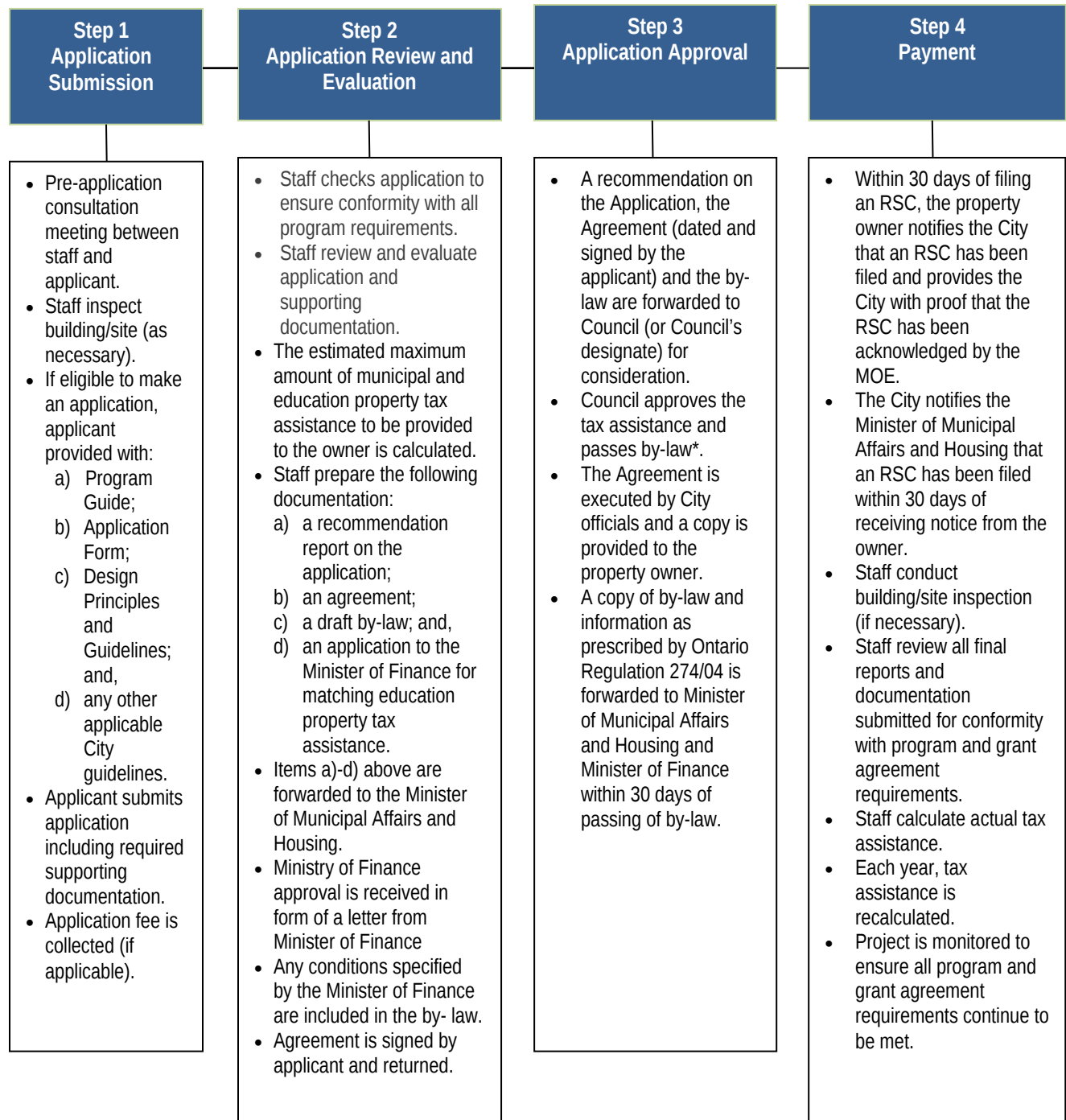
Step 4 Payment

Where the Minister of Finance has approved an application for matching education property tax assistance, the municipal property tax assistance and education property tax assistance will begin as stipulated under the by-law for tax assistance approved by Council.

Once remediation of the property is complete, the property owner shall file in the Environmental Site Registry a Record of Site Condition (RSC) for the property signed by a qualified person, and the owner shall submit to the City proof that the RSC has been acknowledged by the Ministry of the Environment (MOE). The owner shall, within 30 days of filing the RSC, notify the City of the filing, and within 30 days after receiving said notice, the City shall advise the Minister of Municipal Affairs and Housing of the filing of the RSC.

Tax assistance will not be provided until the landowner has first met conditions related to the rehabilitation and development of the lands. All property taxes would be payable and collected until these conditions have been satisfied. Once these conditions have been satisfied, tax assistance for both the municipal and education amounts would be provided to the landowner as identified in the by-law.

Figure G-1 Administration of the Brownfields Tax Assistance Program



Appendix H

Administration of the Development Charge Grant Program

Step 1 Application Submission

Only owners of properties are eligible to apply for this program. Applicants will be required to have a pre-application consultation meeting with staff in order to determine program eligibility, proposed scope of work, project timing, and preliminary development concept including proposed building size, height and density, number of residential units, gross floor area of residential and commercial space and other project details. This pre-application meeting shall occur prior to commencement of any works to which the development charge grant will apply. Staff will perform an initial site visit(s) and inspection(s) of the building/property (as necessary).

Before accepting an application, staff will screen the proposal and application. If the application is not within the Community Improvement Project Area, or the application clearly does not meet the program eligibility criteria, the application will not be accepted. If City staff determines that the application is not acceptable for one or more of the above noted reasons, the application will be returned to the applicant with a letter explaining the reason for not accepting the application. Acceptance of the application by the City in no way implies program approval.

The City may request that applications for this program be accompanied by supporting documentation, including but not necessarily limited to:

- a) electronic and printed photographs of the existing building facade;
- b) historical photographs and/or drawings;
- c) a site plan and/or professional design study/architectural drawings;
- d) specification of the proposed works including a work plan for the improvements to be completed and construction drawings;
- e) estimated project construction costs, including a breakdown of said costs;
- f) impact studies such as traffic studies and studies of microclimatic conditions (sun, shadow, wind)
- g) environmental reports and/or a Record of Site Condition (RSC);
- h) a Business Plan; and,
- i) any other financial information.

An application fee may be collected at the time of application.

Step 2 Application Review and Evaluation

Applications and supporting materials and documentation are reviewed by staff against program requirements and applicable City guidelines. Staff will determine the eligible works and costs.

For buildings designated under the *Ontario Heritage Act*, any facade restoration and improvement works should be supported by documentation in the form of historic photographs or drawings clearly showing the feature(s) to be restored or reconstructed.

A recommendation report will be prepared by City staff regarding the Development Charge Grant. If this report recommends approval of the application, a grant agreement satisfactory to the City

Solicitor will also be prepared. This agreement will contain conditions to ensure that the project is commenced and completed in a timely fashion and meets the applicable as-built project performance criteria. This agreement will be forwarded to the applicant to be dated and signed. Once the signed agreement has been returned to the City, the Council application approval process can commence.

Step 3 Application Approval

The recommendation report along with the grant agreement (if report recommends approval) is forwarded to Council or Council's designate for consideration. If Council or Council's designate approves the application and grant agreement, the agreement is executed (signed and dated) by City officials and a copy is provided to the applicant.

Step 4 Payment

If the application meets the general and program specific requirements and is approved, up to 100% of the Development Charges to be paid will be initially deferred with a grant to be paid by the City into its Development Charges Reserve Fund on behalf of the applicant at the end of the deferral period, only once:

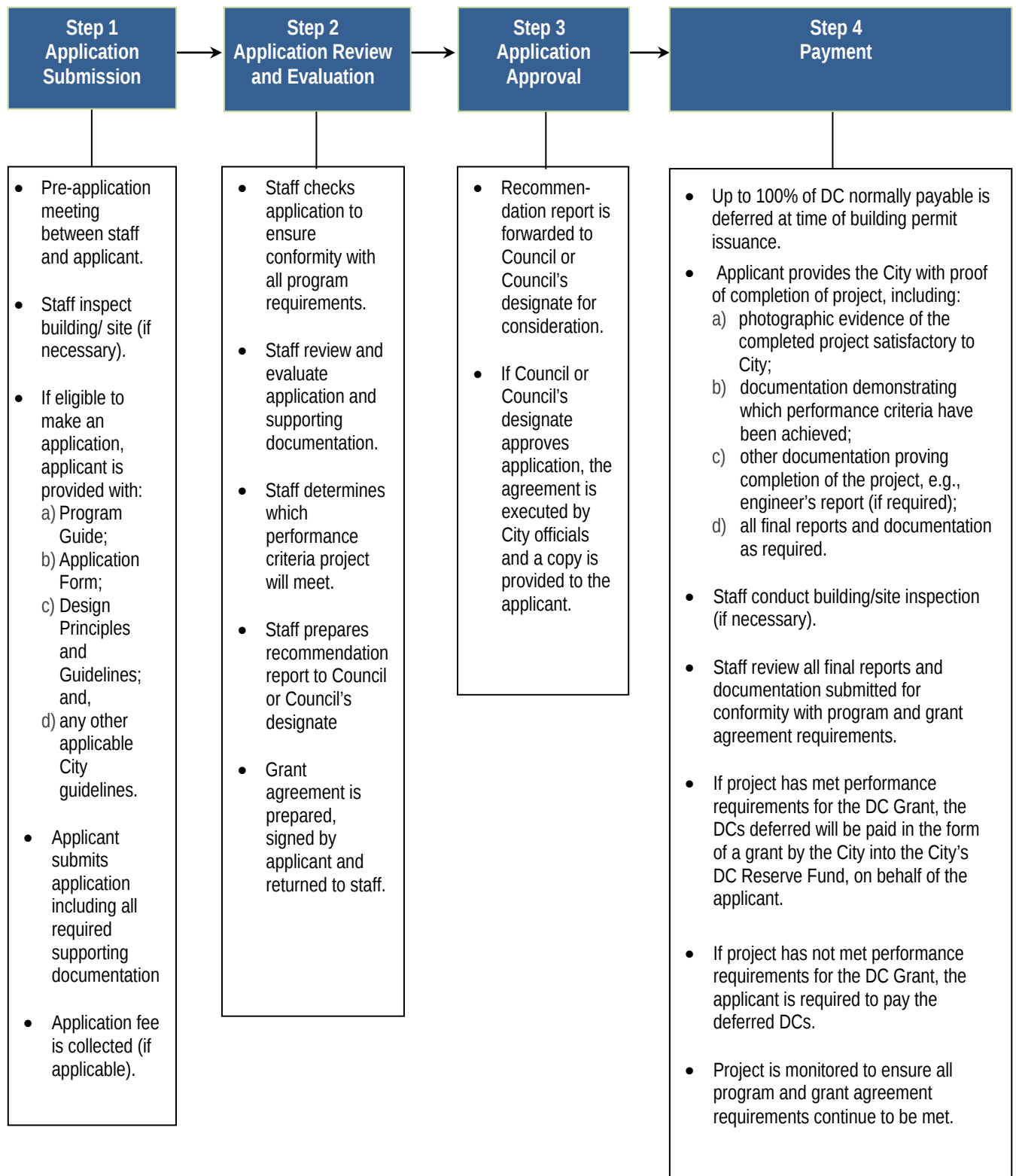
- a) The eligible project is complete;
- b) Final building inspections have taken place;
- c) An occupancy permit has been issued (as applicable);
- d) All deficiencies have been addressed;
- e) all program and grant agreement requirements have been met to the City's satisfaction; and,
- f) The as-built project performance has been determined by the City and the as-built performance of the project meets the specified performance criteria.

Staff will conduct a final building/site inspection (as necessary) and conduct final review of all supporting documentation to ensure that the project has been completed in accordance with the grant application and agreement and meets the required as-built project performance criteria.

If the project has been completed in accordance with the grant application and agreement and meets the required as-built project performance criteria, the Development Charge amount that has been deferred will be paid in the form of a grant by the City into the City's Development Charge Reserve Fund on behalf of the applicant.

If the project has not been completed in accordance with the grant application and agreement and/or the project does not meet the required as-built project performance criteria, the applicant will be required to pay the Development Charge amount that has been deferred.

Figure H-1 Administration of the Development Charge Grant Program



Appendix I

Administration of the Fees Grant Program

Step 1 Application Submission

Upon completion of the project, an application for a Fee Grant can be made.

Before accepting an application, staff will screen the application. If the application is not within the Community Improvement Project Area, or the application clearly does not meet the program requirements, the application will not be accepted. If staff determine that the application is not acceptable for one or more of the above noted reasons, the application will be returned to the applicant with a letter explaining the reason for not accepting the application. Acceptance of the application by the City in no way implies program approval.

Applications must be accompanied by receipts for all eligible planning and development applications, sign permit and building fees paid to the City.

Step 2 Application Review and Evaluation

Applications and receipts will be reviewed by staff to determine eligible costs. A recommendation report will be prepared by staff.

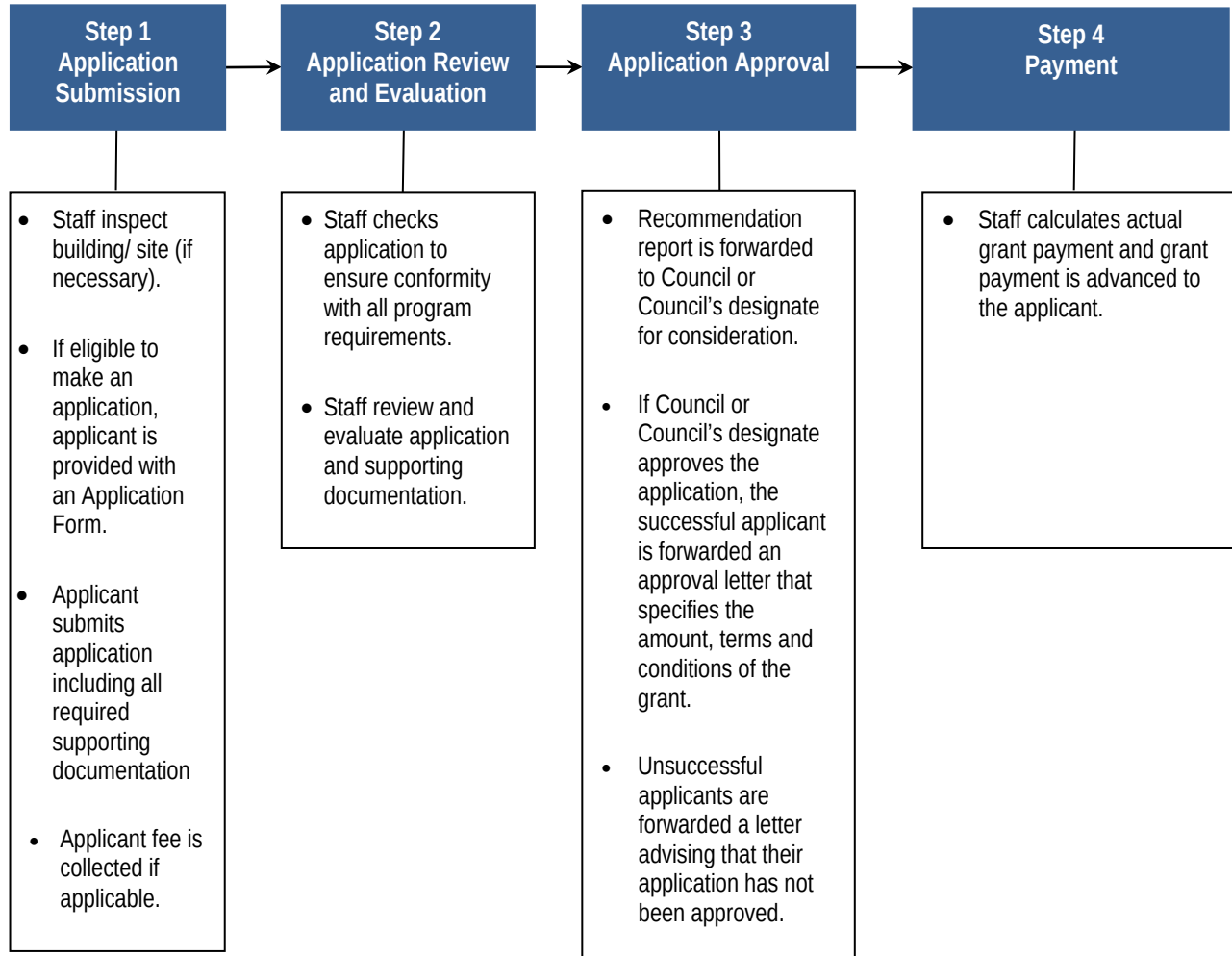
Step 3 Application Approval

The recommendation report is forwarded to Council or Council's designate for consideration. If Council or Council's designate approves the application, the applicant will be sent a letter that outlines the amount of the grant. If an application is not approved, the applicant will also be advised by letter.

Step 4 Payment

Grants approved under this program would be paid to the applicant and a receipt confirmation letter issued.

Figure I-1 Administration of the Fees Grant Program



Appendix J

Performance Requirements for the Development Charge Grant Program

In order to qualify for the Development Charge Program, the as-built project must include at least three (3) of the following criteria:

- a. Creates an increase in assessment value of at least \$2,500,000;
- b. On a brownfield site⁶ greater than 0.4 ha. (1 acre) in size;
- c. Incorporates exemplary urban design and/or significantly contributes to maintaining the heritage character of the Project Area;
- d. Achieves LEED certification or other sustainable design/construction standards recognized by the City;
- e. Includes a minimum of 25% residential units that are affordable and a minimum of 10 affordable residential units;
- f. In the opinion of the City, the project is of a size and scale that will spur redevelopment of adjoining and nearby properties within the Project Area.

⁶ Brownfield sites are sites where a Phase II Environmental Site Assessment (ESA) has been conducted, and that as of the date the Phase II ESA was completed, did not meet the required standards under subparagraph 4i of Section 168.4(1) of the *Environmental Protection Act* to permit a Record of Site Condition (RSC) for the proposed use to be filed in the Environmental Site Registry.

Appendix K

Applications and Permits Eligible for the Fees Grant Program

The following types of planning and development applications and building permits are considered eligible for this program:

- i) Official Plan Amendment;
- ii) Zoning By-law Amendment;
- iii) Minor Variance;
- iv) Consent to Sever;
- v) Site Plan Control and Development Agreements;
- vi) Plan of Subdivision/Condominium;
- vii) Rental Housing Protection Act;
- viii) Sign Permit;
- ix) Sidewalk Café Permit;
- x) Encroachment Agreement;
- xi) Demolition Permit;
- xii) Building Permit; and,

Other permits issued by the City that are not listed above, but which advance the purpose of this program, may be considered.

