

**Education Development Charges Background  
Study and Review of Education Development  
Charges Policies for:**

**Hamilton-Wentworth District School Board**

May 26, 2014



Enhancing Our Living and  
Learning Communities



## FOREWORD

The following document fulfills section 257.61 of the Education Act which states “before passing an education development charge by-law, the board shall complete an education development charges background study”. The following document contains the Education Development Charge (EDC) Background Study report for the Hamilton-Wentworth District School Board (HWDSB).

The following document also contains the background report pertaining to a “review of the Education Development Charges policies” of the HWDSB, consistent with the legislative requirements to conduct a review of the existing EDC policies of the Board prior to consideration of adoption of a successor EDC by-law.

## ACKNOWLEDGEMENTS

The consultants wish to acknowledge, with appreciation, the efforts of the school board staff that provided invaluable assistance throughout the study process.

Further, the consultants wish to acknowledge the assistance of Mr. Mark Giavedoni, Evans, Philp LLP, legal counsel for the Board on education development charge matters, as well as the expertise provided by Mr. Mark Boyak, Boyak & Associates Limited, on matters dealing with site valuation.

*The contents of this report, including the formats, spreadsheet models and model outcomes are the property of Ameresco Asset Sustainability Group. The content may not be copied, published, distributed, downloaded, transmitted or converted, in any form, or by any means, electronic or otherwise, without the prior written permission of Ameresco Asset Sustainability Group*



## Table of Contents

EXECUTIVE SUMMARY.....	3
Chapter 1 -- INTRODUCTION .....	7
1.1 Background.....	7
1.2 EDC By-law .....	8
1.3 Rationale for Considering Adoption of New EDC By-law.....	10
1.4 Policy Review Process and By-law Adoption Consultation Requirements.....	10
1.5 Legislative Requirements to Adopt a New EDC By-law.....	11
1.6 Eligibility to Impose Education Development Charges and Form A .....	14
1.7 Background Study Requirements.....	15
1.8 EDC Study Process.....	16
Chapter 2 -- METHODOLOGICAL APPROACH .....	19
2.1 Planning Component.....	19
2.2 Financial Component:.....	21
Chapter 3 – JURISDICTION OF THE BOARD .....	25
3.1 Legislative Provisions.....	25
3.2 Analysis of Pupil Accommodation by “Review Area” .....	25
Chapter 4 – RESIDENTIAL / NON-RESIDENTIAL GROWTH FORECAST .....	31
4.1 Background.....	31
4.2 Legislative Requirements.....	31
4.3 Residential Growth Forecast and Forms B and C .....	32
4.4 Non-Residential Growth Forecast and Form D .....	39
Chapter 5 – DEMOGRAPHIC TRENDS AND FUTURE ENROLMENT EXPECTATIONS...41	
5.1 Demographic and Enrolment Trends.....	41
5.2 Projections of Pupil Accommodation Needs .....	49
Chapter 6 – SITE REQUIREMENTS AND VALUATION .....	58
6.1 Legislative Requirements.....	58
6.2 Site Requirements .....	60
6.3 Site Valuation .....	61
6.4 Land Escalation over the Forecast Period.....	63

6.5	Site Preparation/Development Costs .....	65
Chapter 7: EDC CALCULATION .....		68
7.1	Growth Forecast Assumptions .....	68
7.2	EDC Pupil Yields .....	68
7.3	Determination of Net Growth-Related Pupil Place Requirement .....	70
7.4	Approved Capital Cost Per Pupil.....	71
7.5	Net Education Land Costs and Forms E, F and G .....	72
	Elementary Review Areas .....	75
7.6	EDC Accounts.....	124
7.7	Cash Flow Analysis and Forms H1 and H2.....	126
7.8	Non-Residential Share .....	130
7.9	Education Development Charges .....	131
Appendix A – Hamilton-Wentworth District School Board – Draft EDC By-law .....		132
Appendix B – Hamilton-Wentworth District School Board – Background Document Pertaining to a Review of the Education Development Charge Policies .....		145
Appendix B -- BACKGROUND DOCUMENT PERTAINING TO A REVIEW OF THE EDUCATION DEVELOPMENT CHARGE POLICIES OF THE HAMILTON- WENTWORTH DSB.....		147
APPENDIX C – Hamilton-Wentworth District School Board -- EDC Policies Re Operating Surpluses and Alternative Accommodation Arrangements.....		169
C.1	School Sites – Operating Budget Surplus.....	171
C.2	Alternative Arrangements for School Facilities .....	175

## EXECUTIVE SUMMARY

The purpose of this report is to provide background information with respect to the calculation of the Hamilton-Wentworth District School Board's (HWDSB) Education Development Charges (EDCs) to be implemented in a new EDC by-law for the City of Hamilton.

The Board will seek input from the public and hold public meetings on June 16, 2014 to give consideration to the public submissions prior to passage of education development charges proposed for August 25, 2014.

Paragraph 23 of the existing EDC by-law for the HWDSB indicates that the by-law expires on August 30, 2014 unless it is repealed sooner. The by-law was adopted on June 17, 2013 with implementation on June 22, 2013.

The primary purpose for any Board in implementing education development charges is to provide a source of funding for growth-related education land costs which are not funded by capital grant allocations under the Province's capital funding model.

EDCs may be set at any level, provided that:

- The procedures set out in the Regulation and required by the Ministry are followed and only growth-related net education land costs are recovered; and,
- No more than 40% of the applicable cost is financed via non-residential development (including non-exempt commercial, industrial and institutional development).

The EDC calculation is based on new pupils generated by new dwelling units within the City of Hamilton for which:

- building permits will be issued over the fifteen year forecast period mid-2014 to mid-2029;
- additional land is required to meet growth-related accommodation needs; and
- education development charges may be imposed on the new dwelling units.

A forecast of new dwelling units in the area in which EDCs are to be imposed, over the 15-year forecast period, were derived from a consideration of the City of Hamilton 2014 Development Charges Background Study residential and non-residential growth forecasts.

The dwelling unit and phasing of development forecast derived as the basis for the determination of the proposed EDC is net of the residential statutory exemptions related to demolitions, conversions and housing intensification.

The forecast of non-residential development is also based on the 2014 City of Hamilton Development Charges Background Study forecast of employment and non-residential gross floor area.

The City of Hamilton's housing forecast suggests that an additional 50,292 net new occupied dwelling units will be added to the existing housing stock over the next fifteen years at an average of 3,353 units per annum. Of the net additional dwelling units, approximately 35.1% are anticipated to be low density (single and semi-detached), 31.8% medium density (row houses, townhouses, etc.), and the remaining 33.1% will be high density apartment units.

The capacity of the elementary and secondary facilities in the Board's existing inventory is reflective of the On-the-Ground (OTG) capacities approved by the Ministry for EDC purposes, and that, in the opinion of the Board could reasonably be used to accommodate growth-related pupils. The capacity of Kindergarten space has been adjusted to reflect the Province's Full-Day Kindergarten initiative.

Consultant-prepared 15-year school enrolment projections are used to determine the number of growth-related school sites required as a result of anticipated enrolment growth within portions of the Board's jurisdiction. The information respecting both projected enrolment and growth-related site needs was compared to the Board's anticipated capital priority needs.

All elementary enrolment projections are "headcount enrolment" as this is reflective of the Provincial initiative respecting full-day kindergarten. Secondary enrolments are reflective of "average daily enrolment." In addition, for the purpose of Education Development Charges, the enrolment projections are prepared from the perspective of accommodating pupils in their home school areas over the long term (i.e., holding situations outside of the review area are transferred back to their resident area where applicable).

The projected enrolment figures for the new housing development shown in the EDC submission (Chapter 7) are a cumulative fifteen-year enrolment forecast of "headcount enrolment."

The jurisdiction-wide mid-2014 to mid-2029 projections of enrolment indicate that the number of elementary pupils will increase by 5,275 (34,329 – 39,604) and secondary pupils will increase by 353 (15,675 – 16,028) students.

The determination of net growth related pupil places (NGRPP) and associated growth-related site needs reflect projected 2014 to 2029 growth within each of the 17 elementary and 6 secondary review areas. Projected growth takes into consideration housing development by community and the Board's schools impacted by the development.



Site costs and site preparation/development costs reflect a combination of the Board's recent site acquisition experiences and appraisal research recently undertaken by Boyak & Associates Limited on its behalf.

Non-residential gross floor area (GFA) over the forecast period is projected to be 23,432,152 million additional sq. feet of "net" gross floor area.

As a result of undertaking all of the necessary research and completing the EDC submission, the proposed education development charges for the Board, where 85% of the costs are recovered from new residential development and 15% are recovered from new non-residential development are as follows:

\$1,017 Per Residential Unit and  
\$0.39 Per Sq. Ft. of Non-Residential Gross Floor Area

By comparison, in June 2013, the HWDSB adopted an EDC by-law that enabled the collection of \$1,040 per residential unit and \$0.40 per sq. ft. of non-residential GFA.

The Board may choose to retain this approach or may elect to allocate a different percentage of the charge (a minimum of 0% up to a maximum of 40%) to non-residential development.

The EDC forms for the Board were submitted to the Ministry of Education for approval, on May 27, 2014. Ministerial approval of the enrolment projections and the number of sites identified is required prior to by-law adoption.

The range of possible charges depends on the Board's choice of the percentage of the growth-related net education land cost that is to be funded by charges on residential development and the percentage, if any, that is to be funded by charges on non-residential development.

The percentage that is to be funded by charges on non-residential development shall not exceed 40 percent, according to Section 7, paragraph 8 of Ontario Regulation 20/98 as amended regarding Education Development Charges. The range of possibilities for the Board is set out below:

Hamilton-Wentworth District School Board		
<i>% to be funded from Non-Residential Development</i>	<i>Residential Education Development Charge (Per Dwelling Unit)</i>	<i>Non-residential Education Development Charge (Cost Per Sq. Ft. of GFA)</i>
0%	\$1,196	\$0.00
5%	\$1,137	\$0.13
10%	\$1,077	\$0.26
15%	\$1,017	\$0.39
20%	\$957	\$0.51
25%	\$897	\$0.64
40%	\$718	\$1.03

Table S-1 outlines the determination of the net growth-related pupil places by review area for both the elementary and secondary panels for the Board.

**Table S-1 – Hamilton-Wentworth District School Board**

Education Development Charges Submission 2014  
Growth-Related Pupil Place Requirements

Elementary Panel

Review Area	Total Cumulative 15 Year Net Unit Projections (1)	% Total Forecast Municipal Residential (2)	Weighted Blended EDC Pupil Yield (3)	Pupil Requirements of New Development (4)=(1*3)	OTG Capacity (5)	2027/28 ADE Existing Community Projections (6)	Net Growth Related Pupil Places Requirements (8)
E01A - Queens Rangers	20	0.0%	0.2768	6	190	117	6
E01B - Ancaster	2,228	4.4%	0.1673	373	1,829	1,935	373
E01C - West Glanbrook	783	1.6%	0.1547	121	529	393	121
E01D - West Hamilton Mountain	3,263	6.5%	0.0763	249	3,347	2,704	249
E02A - East Waterdown	4,897	9.7%	0.1824	893	385	309	817
E02B - West Waterdown	2,960	5.9%	0.2137	632	1,185	1,045	492
E02C - East Flamborough	84	0.2%	0.3420	29	652	549	29
E02D - Dundas and West Flamborough	531	1.1%	0.1692	90	2,942	2,139	90
E03A - East Glanbrook	5,087	10.1%	0.2143	1,090	920	1,087	1,090
E03B - East Glanbrook and Upper Stoney Creek	10,270	20.4%	0.1991	2,045	1,910	1,785	1,767
E04A - West Hamilton City - Westdale	8,707	17.3%	0.0283	247	6,224	4,547	247
E04B - Central Hamilton City	432	0.9%	0.0130	6	3,060	2,499	6
E05A - Central Mountain	446	0.9%	0.1310	58	3,339	2,184	58
E05B - East Mountain	1,852	3.7%	0.3001	556	4,448	4,096	556
E06A - East Hamilton Mountain	34	0.1%	0.1551	5	3,095	1,836	5
E06B - East Hamilton - Lower Stoney Creek	2,299	4.6%	0.0978	225	4,661	3,641	225
E06C - Winona	6,399	12.7%	0.1831	1,171	770	944	589
<b>TOTAL</b>	<b>50,292</b>	<b>100.0%</b>	<b>0.1550</b>	<b>7,796</b>	<b>39,486</b>	<b>31,808</b>	<b>6,719</b>

Secondary Panel

Review Area	Total Cumulative 15 Year Units Projections (1)	% Total Forecast Municipal Residential Growth (2)	Weighted Blended EDC Pupil Yield (3)	Pupil Requirements of New Development (4)=(1*3)	OTG Capacity (5)	2027/28 ADE Existing Community Projections (6)	Net Growth Related Pupil Places Requirements (8)
S01 - Ancaster - West Hamilton Mountain	6,294	12.5%	0.0548	345	3,879	3,004	345
S02 - Dundas - Flamborough	8,472	16.8%	0.0644	546	2,637	1,684	546
S03 - East Glanbrook - Upper Stoney Creek	15,357	30.5%	0.0726	1,115	954	1,169	1,115
S04 - Central and West Hamilton City	9,139	18.2%	0.0129	118	2,521	2,752	118
S05 - East Mountain	2,298	4.6%	0.0868	199	2,558	2,197	199
S06 - East Hamilton - Stoney Creek	8,732	17.4%	0.0412	360	3,504	2,538	360
<b>TOTAL</b>	<b>50,292</b>	<b>100.0%</b>	<b>0.0534</b>	<b>2,684</b>	<b>16,053</b>	<b>13,345</b>	<b>2,684</b>

## Chapter 1 -- INTRODUCTION

### 1.1 Background

Education development charges (EDCs) are charges which may be levied by a Board on residential, industrial, commercial and institutional development (excluding municipal, school, specified residential additions to existing units and replacement dwellings, as well as specific exemptions for industrial expansions of gross floor area and replacement non-residential development) pursuant to Division E of Part IX of the *Education Act*. The charges relate to the net education land cost of providing additional land (school sites and/or site development costs) for growth-related pupils. The charges are collected at building permit issuance by the area municipality, implementing the provisions of the Board's education development charge by-law.

Education development charges are the primary source of funding site acquisition needs for a school board experiencing growth within its jurisdiction. An EDC by-law may cover a board's entire jurisdiction or an area within that jurisdiction.

Section 257.54 of the *Education Act* allows a board to "pass by-laws for the imposition of education development charges" if there is residential land in the jurisdiction of a board that would increase education land costs.

However, education development charges as a means of financing site acquisition costs are only available to boards who qualify under the legislation. To qualify, the Board's projected enrolment over a consecutive five year period must exceed permanent capacity at the time of by-law passage on either the elementary or secondary panel, for the entire Board jurisdiction, or alternatively, the Board must demonstrate that it has an existing unmet financial obligation arising from the predecessor EDC by-law.

Further, Section 257.70 of the *Education Act* enables a board to "pass a by-law amending an education development charge by-law." A by-law amendment allows a board the opportunity to revisit the by-law where actual expenditures exceed cost estimates, in an effort to ensure full cost recovery. If, for instance, recent site acquisition or site development costs are higher or lower than estimated in the existing by-law calculation, an amendment could be undertaken to incorporate these increased or decreased costs into the EDC rate structure(s). The same is true for by-law renewal, in that the transitional EDC account analysis

determines the relationship between EDC revenue raised and site acquisition/site development needs generated by enrolment growth over the by-law period. In addition, a school board may pass a by-law amendment to recognize agreements approved by the board to acquire land post by-law adoption.

## 1.2 EDC By-law

The Hamilton-Wentworth District School Board currently has an EDC by-law applicable to new residential development within the City of Hamilton. The by-law is under the legislative authority of the *Education Act*, R.S.O., 1990.

The adopted EDC rates for all Boards with in-force EDC by-laws are set out below.

## EDUCATION DEVELOPMENT CHARGE BY-LAWS IN THE PROVINCE OF ONTARIO

Board	Effective Date of By-law	By-law Term	Area to which By-law Applies	Type of Charge	Res. Charge/ Unit	Non-Res. Charge/ Sq. Ft. of G.F.A.	% of Charge Attributed to Residential Development	% of Charge Attributed to Non-Residential Development
Algonquin & Lakeshore Catholic DSB	12-Oct	5 yrs	City of Kingston	A/S	\$124	\$0.00	100%	0%
Brant Haldimand Norfolk Catholic DSB	13-Nov	5 yrs	City of Brantford, County of Brant	A/S J/W/r	\$912	\$0.00	100%	0%
Conseil des écoles publiques de l'Est de l'Ontario	14-Apr	5 yrs	City of Ottawa	J/W/r	\$423	\$0.22	85%	15%
Conseil des écoles catholiques du Centre-Est	14-Apr	5 yrs	City of Ottawa	J/W/r	\$545	\$0.40	85%	15%
Dufferin-Peel Catholic DSB	13-Jan	5 yrs	Peel Region	J/W/r	\$551	\$0.33	75%	25%
Durham Catholic DSB	09-May	5 yrs	Durham Region (excl. Clarington)	J/W	\$541	\$0.00	100%	0%
Durham DSB	09-May	5 yrs	Durham Region (excl. Clarington)	J/W	\$1,423	\$0.00	100%	0%
Greater Essex County DSB	14-May	5 yrs	City of Windsor	J/W/r	\$305	\$0.00	100%	0%
Greater Essex County DSB	14-May	5 yrs	County of Essex and the Township of Pelee	J/W/r	\$305	\$0.00	100%	0%
Halton Catholic DSB	13-Jun	5 yrs	Halton Region	J/W	\$1,484	\$0.38	85%	15%
Halton DSB	13-Jun	5 yrs	Halton Region	J/W	\$2,691	\$0.69	85%	15%
Hamilton-Wentworth Catholic DSB	09-Aug	5 yrs	City of Hamilton	J/W	\$739	\$0.22	85%	15%
Hamilton-Wentworth DSB	13-Jun	14 mos	City of Hamilton	J/W	\$1,040	\$0.40	85%	15%
Kawartha Pine Ridge DSB	10-Jul	5 yrs	Clarington	A/S	\$994	\$0.38	90%	10%
Ottawa Catholic SB	14-Apr	5 yrs	City of Ottawa	J/W	\$466	\$0.34	83%	17%
Ottawa-Carleton DSB	14-Apr	5 yrs	City of Ottawa	J/W	\$723	\$0.82	80%	20%
Peel DSB	13-Jan	5 yrs	Peel Region	J/W	\$1,595	\$0.32	90%	10%
Peterborough, Victoria, Northumberland & Clarington Catholic DSB	10-Jul	5 yrs	Clarington	A/S	\$120	\$0.05	90%	10%
Simcoe Muskoka Catholic DSB	13-Nov	5 yrs	Simcoe County	J/W/r	\$448	\$0.12	90%	10%
Simcoe County DSB	13-Nov	5 yrs	Simcoe County	J/W	\$1,311	\$0.35	90%	10%
Toronto Catholic DSB <sup>1</sup>	13-Jul	5 yrs	City of Toronto	J/W (with exempt areas)	\$693	\$0.62	75%	25%
Upper Grand DSB	09-Aug	5 yrs	Dufferin County	J/W/r	\$391	\$0.00	100%	0%
Upper Grand DSB	09-Aug	5 yrs	Wellington County	J/W/r	\$842	\$0.00	100%	0%
Waterloo Catholic DSB	11-May	5 yrs	Regional Municipality of Waterloo	J/W	\$425	\$0.31	80%	20%
Waterloo Region DSB	11-May	5 yrs	Regional Municipality of Waterloo	J/W	\$1,266	\$0.92	80%	20%
Wellington Catholic DSB	09-Aug	5 yrs	Wellington County	J/W	\$455	\$0.00	100%	0%
York Catholic DSB	09-Jul	5 yrs	York Region	J/W	\$650	\$0.17	90%	10%
York DSB	09-Jul	5 yrs	York Region	J/W	\$1,370	\$0.35	90%	10%

- Rates for the Toronto Catholic District School Board are phased in as follows:
  - July 1, 2014 to June 30, 2015, \$841.00 per unit and \$0.67 per sq ft of GFA
  - July 1, 2015 to June 30, 2016, \$990.00 per unit and \$0.71 per sq ft of GFA
  - July 1, 2016 to June 30, 2017, \$1,150.00 per unit and \$0.83 per sq ft of GFA
  - July 1, 2017 to June 30, 2018, \$1,309.00 per unit and \$0.94 per sq ft of GFA

### 1.3 Rationale for Considering Adoption of New EDC By-law

The HWDSB adopted an initial jurisdiction-wide EDC by-law covering the City of Hamilton in June 2013. The existing by-law, adopted on June 17, 2013 could remain “in force” until August 30, 2014 unless repealed or rescinded earlier by the Board. The Board expects to adopt a successor EDC by-law on August 25, 2014.

### 1.4 Policy Review Process and By-law Adoption Consultation Requirements

In order to consider the adoption of a new EDC by-law, the Board must first undertake a review of its existing EDC policies, in accordance with the legislation.

Section 257.60 sub-section (1) of the *Education Act* states that:

“Before passing an education development charge by-law, the board shall conduct a review of the education development charge policies of the board.”

Sub-section (2) goes on to state that:

“In conducting a review under subsection (1), the board shall ensure that adequate information is made available to the public, and for this purpose shall hold at least one public meeting, notice of which shall be given in at least one newspaper having general circulation in the area of jurisdiction of the board.”

As the Board has an existing EDC by-law in place, this section, therefore, has the effect of requiring a minimum of two public meetings to be held as part of consideration of a new education development charge by-law.

The purpose of the first public meeting is to ensure that adequate information is made available to the public relative to the Board’s review of its education development charge policies. This meeting will be held on Monday, June 16, 2014 at 5:00 pm at the City of Hamilton Council Chambers, 71 Main St. West, Hamilton. Information respecting a review of the Board’s policies is being made available to the public as part of this document. This information entitled “Review of Education Development Charges Policies” is found in Appendix B.

The scheduling of the second public meeting requires that the proposed by-law and the new education development charge background study are made available to the public at least two weeks prior to the

meeting, and to ensure that any person who attends the meeting “may make representations relating to the by-law” (s.257.63(2)). This meeting is scheduled to immediately follow the first public meeting on June 16, 2014.

The Board met with interested development stakeholders on April 15, 2014, to review the EDC process and progress to date and to understand any concerns that stakeholders may have. At this meeting, no concerns regarding the proposed EDC or process were expressed.

Finally, the Board is expected to consider the adoption of a new education development charge by-law on Monday, August 25, 2014. The meeting will be held at the City of Hamilton Council Chambers, 71 Main Street West, Hamilton.

A copy of the “Notice of Public Meetings” is set out below.

## 1.5 Legislative Requirements to Adopt a New EDC By-law

Section 257.54 of the *Education Act* states that “if there is residential development in the area of the jurisdiction of a board that would increase education land costs, the board may pass by-laws for the imposition of education development charges against land in its area of jurisdiction undergoing residential or non-residential development.”

In addition, section 257.61 requires that “before passing an education development charge by-law, the board shall complete an education development charge background study.”

Section 257.62 stipulates that “an education development charge by-law may only be passed within the one-year period following the completion of the education development charge background study.”

Section 10 of O. Reg 20/98 sets out “conditions that must be satisfied in order for a board to pass an education development charge by-law.” These conditions are:

1. The Minister has approved the Board’s estimates of the total number of elementary and secondary pupils over each of the fifteen years of the forecast period.

2. The Minister has approved the Board's estimates of the number of elementary and secondary school sites used by the Board to determine the net education land costs.
3. The Board has given a copy of the education development charge background study relating to the by-law (this report) to the Minister and each Board having jurisdiction within the area to which the by-law would apply.
4. The Board meets at least one of the following conditions:
  - Either the estimated average elementary or secondary enrolment over the five year by-law period exceeds the respective total capacity (OTG capacity adjusted for FDK loading where approved by the Province) that, in the Board's opinion is available to accommodate pupils, throughout the jurisdiction, on the day that the by-law is passed, or
  - At the time of expiry of the Board's last EDC by-law that applies to all or part of the area in which the charges would be imposed, the balance in the EDC account is less than the amount required to pay outstanding commitments to meet growth-related net education land costs, as calculated for the purposes of determining the EDCs imposed under that by-law.





**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD  
NOTICE OF PUBLIC MEETINGS  
EDUCATION DEVELOPMENT CHARGES  
CITY OF HAMILTON**

**FIRST MEETING – POLICY REVIEW  
MONDAY, JUNE 16, 2014 @ 5:00 P.M.**  
City of Hamilton Council Chambers,  
71 Main Street West, Hamilton

TAKE NOTICE that on June 16, 2014, the Hamilton-Wentworth District School Board will hold a public meeting pursuant to Section 257.60 of the Education Act at the location shown above. The purpose of the meeting will be to review the current education development charge policies of the Board and to solicit public input. Any person who attends the meeting may make a representation to the Board in respect of the policies. The Board will also consider any written submissions.

**SECOND MEETING – SUCCESSOR BY-LAW  
MONDAY, JUNE 16, 2014 @ 6:00 P.M.**  
City of Hamilton Council Chambers,  
71 Main Street West, Hamilton

AND FURTHER TAKE NOTICE that on June 16, 2014, the Hamilton-Wentworth District School Board will hold a second public meeting at the same location. This meeting will be held pursuant to Section 257.63 of the Education Act. The purpose of the second public meeting is to consider the continued imposition of education development charges and a successor by-law and to inform the public generally about the Board's education development charge proposal. Any person who attends the meeting may make a representation to the Board in respect of the proposal. The Board will also consider any written submissions. All submissions received in writing and those expressed at the public meeting will be considered prior to the enactment of the education development charge by-law. On Monday, August 25, 2014, the Board will consider the enactment of a by-law imposing education development charges in the City of Hamilton.

The education development charge background study required under Section 257.61 of the Act (including the proposed EDC by-laws) together with the policy review analysis required under Section 257.60 of the Act will be available on May 27, 2014, at the Board's administrative offices during regular office hours and on the Board's website at [www.hwdsb.on.ca](http://www.hwdsb.on.ca).

**THIRD MEETING – IN CONSIDERATION OF BY-LAW ADOPTION  
MONDAY, AUGUST 25, 2014 @ 6:00 P.M.**  
City of Hamilton Council Chambers,  
71 Main Street West, Hamilton

AND FURTHER TAKE NOTICE that on Monday, August 25, 2014, the Hamilton-Wentworth District School Board will hold a third public meeting at the location shown above. The purpose of this meeting is to allow the Board to consider the enactment of a successor EDC by-law that will apply to development in the City of Hamilton. Any person who attends the meeting may make a representation to the Board in respect of this matter. Written submissions, filed in advance of the meeting, will also be considered.

All interested parties are invited to attend the public meetings. The Board would appreciate receiving written submissions one week prior to the public meetings so that they may be distributed to trustees prior to the meetings. Submissions and requests to address the Board as a delegation should be submitted to:

Hamilton-Wentworth District School Board  
Attention: Daniel Del Bianco, Senior Facilities Officer  
120 King Street West, Suite 1120, Hamilton  
Tel: 905-527-5092 x 2362, Cell: 905-531-4032, email: [daniel.delbianco@hwdsb.on.ca](mailto:daniel.delbianco@hwdsb.on.ca)

Any comments or requests for further information regarding this matter may be directed to the Board officials noted above.

**[www.hwdsb.on.ca](http://www.hwdsb.on.ca)**

ALL STUDENTS ACHIEVING THEIR FULL POTENTIAL

## 1.6 Eligibility to Impose Education Development Charges and Form A

The Board's eligibility to impose an EDC is set out in Form A of the EDC Submission in this section:

The HWDSB is eligible to impose a new EDC by-law based on the fact that the Board's balance in its EDC account is less than the amount required to pay outstanding commitments to meet growth-related net education land costs, as calculated for the purposes of determining the EDCs imposed under that by-law.

The Board's deficit in its EDC Account is (\$2,674,328).

### Hamilton-Wentworth District School Board Education Development Charges Submission 2014 Form A - Eligibility to Impose an EDC

#### A.1.1: CAPACITY TRIGGER CALCULATION - ELEMENTARY PANEL

Elementary Panel Board-Wide Capacity	Projected Elementary Panel Average Daily Enrolment Headcount						Elementary Average Projected Enrolment less Capacity
	Year 1 2014/ 2015	Year 2 2015/ 2016	Year 3 2016/ 2017	Year 4 2017/ 2018	Year 5 2018/ 2019	Average Projected Enrolment Over Five Years	
39,486	34,329	34,331	34,540	34,624	34,769	34,518	-4,968

Board-wide Capacity reflects all Purpose-built Kindergarten rooms existing or approved for funding and loaded at 26 pupils per classroom

#### A.1.2: CAPACITY TRIGGER CALCULATION - SECONDARY PANEL

Secondary Panel Board-Wide Capacity	Projected Secondary Panel Average Daily Enrolment (ADE)						Secondary Projected Enrolment less Capacity
	Year 1 2014/ 2015	Year 2 2015/ 2016	Year 3 2016/ 2017	Year 4 2017/ 2018	Year 5 2018/ 2019	Average Projected Enrolment Over Five Years	
16,053	15,675	15,815	15,377	15,718	15,788	15,675	-378

#### A.2: EDC FINANCIAL OBLIGATIONS (Estimated to April 2014)

Adjusted Outstanding Principal:	\$5,096,591
Less Adjusted EDC Account Balance:	\$2,422,263
<b>Total EDC Financial Obligations/Surplus:</b>	<b>-\$2,674,328</b>

## 1.7 Background Study Requirements

The following sets out the information that must be included in an education development charge background study and the appropriate chapter references from the enclosed report:

1. estimates of the anticipated amount, type and location of residential development for each year of the fifteen year forecast period, as well as the anticipated non-residential forecast of gross floor area in the City of Hamilton - Chapter 4;
2. the number of projected new pupil places (Chapter 5) and the number of new sites and/or site development costs required to provide those new pupil places - Chapter 6;
3. the number of existing pupil places available to accommodate the projected number of new pupils in item #2 – Chapter 7;
4. for each school in the Board’s inventory, the number of existing pupil places and the number of pupils who attend the school – Chapter 7;
5. for every existing elementary and secondary pupil place in the Board’s jurisdiction that the Board does not intend to use, an explanation as to why the Board does not intend to do so – Chapter 7;
6. estimates of the education land cost, the net education land cost, and the growth-related net education land costs required to provide the projected new pupil places in item #2, the location of the site needs, the acreage for new school sites, including the area that exceeds the maximum set out in section 2 of O.Reg. 20/98, an explanation of whether the costs of the excess land are education land costs and if so, why – Chapter 7;
7. the number of pupil places that each board estimates will be provided by the school to be built on the site and the number of those pupil places that each board estimates will be used to accommodate the new pupils in item #2 - – Chapter 7;
8. a statement of the board’s policy concerning possible arrangements with municipalities, school boards or other persons or bodies in the public or private sector, including arrangements of a long-

term or co-operative nature, which would provide accommodation for the new pupils in item #2, without imposing EDCs, or with a reduction in such charges – Appendix C.

9. a statement from the board indicating that it has reviewed its operating budget for savings that could be applied to reduce growth-related net education land costs, and the amount of any savings which it proposes to apply, if any – Appendix C.

The Board has developed assumptions in the calculations on which their EDC by-laws will be based.

The legislation stipulates that an education development charge by-law may only be passed within the one-year period following the completion of the education development charge background study. This report, dated May 26, 2014 will be available to the Board as the Trustees consider adoption of the Board's by-law on August 24, 2014

Further, this report will be forwarded to the Minister of Education and each co-terminous board, as per legislative requirements.

## 1.8 EDC Study Process

Figure 1-1 provides an overview of the education development charge process to be followed when a board considers the adoption of its second (and any subsequent) EDC by-law under the *Education Act*, including the policy review process.

**Figure 1-1 -- Overview of the Education Development Charges Process and Proposed Timelines**

PHASE ONE DETERMINING ELIGIBILITY	PHASE TWO ANAYSIS	PHASE THREE CONSIDERATION OF OTHER SOURCES TO MEET THE NEEDS	PHASE FOUR MINISTRY SUBMISSION	PHASE FIVE PUBLIC PROCESS	PHASE SIX BY-LAW ADOPTION AND IMPLEMENTATION
A. Capacity Trigger Evaluation	A. Fifteen Year Estimate of Amount, Type and Location of Residential and Non-Residential Development	A. Board's Policy re Possible Public/Private Sector Partnerships to Provide Additional Accommodation and Statement of How Policy Implemented	A. Completion of Ministry Forms	A. Informal Stakeholder Consultation	A. Liaison with Area Municipal Representatives re Implementation/ Collection Issues
B. EDC Account Analysis	B. EDC Pupil Yields to Determine Average # of New Pupils	B. Operating Budget Savings which could be applied	B. Complete Background Study/Policy Review Document and Forward to M of E, Public and Co-Terminus Boards	B. Public Meeting(s)	B. Board Consideration of Public Input and Revisions, as Necessary
C. EDC Financial Obligation Evaluation	C. By-law Structure and Review Area Analysis	C. Preparation and Distribution of Policy Review Document	C. Conduct Policy Review Public Meeting	C. Review of Public Submissions	C. Second Public Meeting at Discretion of Board
	D. Net Growth-Related Pupil Forecast and Number of New Sites/ Acres of Land Required		D. Ministry of Education Approval		D. By-law Adoption
	E. Estimated Growth-Related Net Education Land Cost and Location of Site (Net of Grants, Surplus EDC Funds, etc.)				E. By-law Implementation
	F. Fiscal Impact of Growth Evaluation and Assessment of Debt Ceiling Impact				F. Notice of By-law Passage/Preparation of EDC Pamphlet
	G. Apportion Costs Residential to Non-Residential				



## Chapter 2 -- METHODOLOGICAL APPROACH

The following chapter outlines the methodology utilized to undertake the background analysis which underlies the proposed education development charge.

There are two distinct aspects to the model. The first is the planning component, which is comprised largely of the dwelling unit projections over a fifteen-year period, the pupil yield analysis, the determination of the requirements of new development, enrolment projections for the existing community, the determination of net growth-related pupil places by review area and the identification of additional site requirements due to growth. The second component, which is the financial component, encompasses the determination of the charge (undertaken in the form of a cashflow analysis), including identification of the site acquisition, site development and study costs, projected expenditure timing, determination of revenue sources and assessment of borrowing impact.

A description of each step in the calculation process resulting in the proposed EDC is set out below.

### 2.1 Planning Component

*Step 1* - Determine the anticipated amount, type, and location of residential development over the 15-year period (i.e., building permits to be issued) and for which education development charges would be imposed during the mid-2014 to mid-2029 forecast period.

The determination of the timing, type and location of development incorporates both a top-down and a bottom-up approach. The following background information was reviewed in establishing the number of units to be constructed and occupied in the City of Hamilton over the 15-year forecast period, as well as the appropriate density mix.

1. City of Hamilton 2014 Development Charges Growth Forecast, November 26, 2013 prepared by Watson & Associates Economists Ltd.
2. The November 2012 Technical Report - Greater Golden Horseshoe Growth Forecasts to 2041, prepared by Hemson Consulting Ltd;

3. Growth Related Integrated Development Strategy: Growth Report, May 2006, Compact Growth Scenario, City of Hamilton

Primary consideration was given to each Board's units in the development approvals process that made up 30,255 of the 50,292 net new dwelling units forecasted to be constructed over the next 15 years. The occupied dwelling unit forecast derived as the basis for the determination of the proposed EDC charge is net of the statutory exemptions related to demolitions and conversions.

The forecast of non-residential development is based on the 2014 City of Hamilton Development Charges forecast of employment and non-residential gross floor area prepared by Watson & Associates Economists Ltd.

*Step 2* - The draft by-law structure is based on a jurisdiction-wide rather than an area-specific approach to the construction of the proposed charge. The policy reasons for this choice are outlined in Appendix B. The review area boundaries are consistent with those in place under the 2009 Background Studies, with the exception of boundary adjustments to reflect elementary school feeder realignments as noted in Chapter 3, and the introduction of Full-Day Kindergarten (FDK) programs, man-made barriers including major arterial roads, railway crossings and industrial areas, municipal boundaries, travel distances within the Board's transportation policies, program requirements etc.

*Step 3* - Utilize the School Facilities Inventory information to determine the Ministry-approved OTG (On-the-Ground) capacities (recognizing the implementation of FDK programs) and the number of portables and portapaks (temporary space) for each existing elementary and secondary facility. Adjust the OTG capacity for pupil spaces, which in the opinion of the Board, are not required to meet the needs of the existing community and to recognize the Ministry of Education's adjustment to Kindergarten classrooms to address the FDK initiative.

*Steps 4 through 6* -- Determine the Board's projections of enrolment, by school, by grade, over the fifteen-year forecast period. Enrolment projections that distinguish the pupil requirements of the existing community (elementary to secondary retention, the number of future JK subscriptions, and the by-grade advancement of the existing student population) from the pupil requirements of new development (the number of pupils anticipated to be generated by new development within the areas to which each by-law will apply and over the next 15 years) were prepared by the consultants and reviewed by Board Planning staff. Finally, the enrolment analyses assume that any pupils temporarily accommodated outside of their resident attendance area are returned to their resident area.



*Step 7* - Determine the number of “available” pupil places by subtracting the Year 2028/29 projected head count enrolment (to reflect FDK) from the total capacity for the review area. The Board is entitled to exclude any available pupil places that, in its opinion, could not reasonably be used to accommodate enrolment growth.

*Step 8* - Complete Form A of the EDC Submission to determine eligibility to impose education development charges.

*Step 9* - Subtract any available and surplus pupil places in existing facilities from the requirements of new development, to determine the net growth-related pupil place requirements by review area. Determine net growth-related pupil places by review area and within each review area in accordance with the timing and location of growth.

*Step 10* - Determine the number of additional school sites and/or site development costs required to meet the net growth-related pupil place need and the timing of proposed expenditures. Where the needs can be met through additions to existing facilities and where no additional land component is required, no sites are identified. However, in the latter circumstances, there may be site development costs incurred in order to accommodate enrolment growth. These costs will be included in the determination of “growth-related net education land costs” where appropriate. In addition, the Board may acquire lands adjacent to existing school sites in order to accommodate enrolment growth.

*Step 11* - Determine the additional sites or acreage required and the basis upon which each Board can acquire the lands.

## 2.2 Financial Component:

*Step 1* - Identify the land acquisition costs (on a per acre basis) in 2014 dollars. Where purchase agreements have been finalized, incorporate the final purchase price.

*Step 2* - Identify site development, site preparation and applicable study costs specified under section 257.53(2) of the *Education Act*.

*Step 3* - Apply an appropriate indexation factor to site preparation/development costs to recognize increased labour and material costs over time.

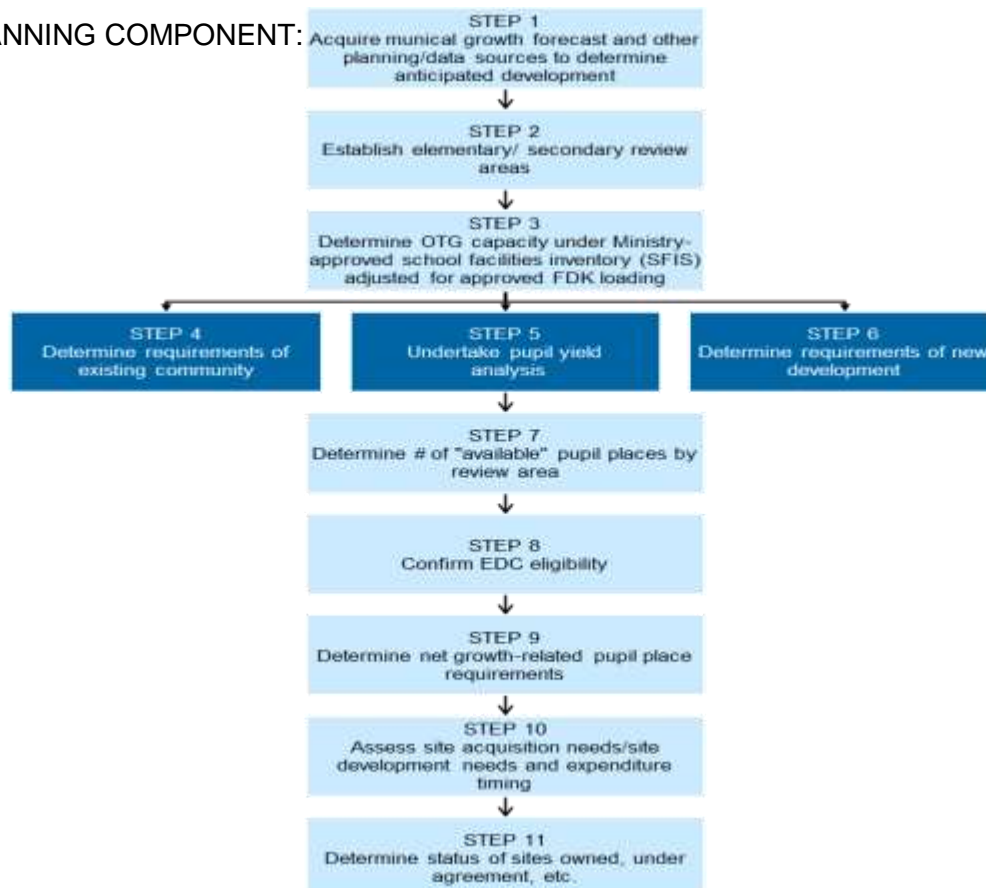
*Step 4* - Determine what amounts, if any, should be applied to reduce the charge as a result of the following:

1. The Board's policy on alternative accommodation arrangements;
2. The Board's policy on applying any operating budget surplus to reduce net education land costs;
3. Any surplus funds in the Board's existing EDC account which should be applied to reduce the charge (if applicable);

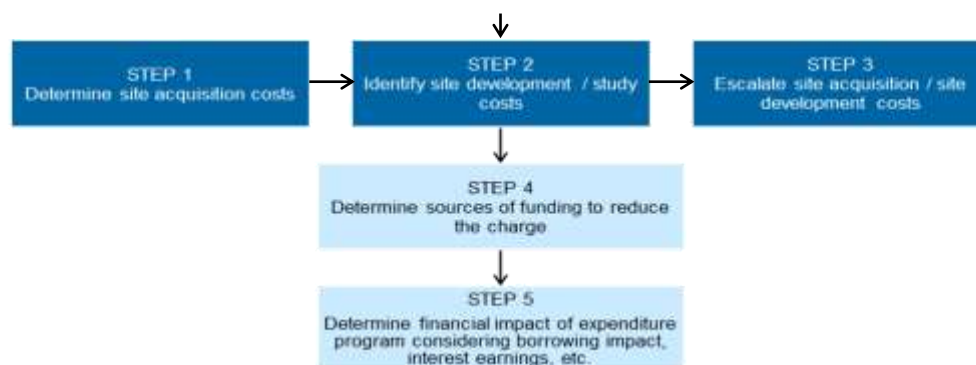
*Step 5* - Determine the quantum of the charge (both residential and non-residential if the intent is to have a non-residential charge), consider borrowing impact (particularly where there are significant deficit EDC account balances) and EDC account interest earnings by undertaking a cashflow analysis of the expenditure program over the 15-year forecast period.

FIGURE 2-1 -- METHODOLOGICAL APPROACH

PLANNING COMPONENT:



FINANCIAL COMPONENT:



<sup>1</sup> Available pupil places, that, in the opinion of the Board, could reasonably be used to accommodate growth (section 7.3 of O. Reg 20/98 as amended)



## Chapter 3 – JURISDICTION OF THE BOARD

### 3.1 Legislative Provisions

Section 257.54(4) of the *Education Act* states that “an education development charge by-law may apply to the entire area of the jurisdiction of a board or only part of it.”

Despite this, “an education development charge by-law of the board shall not apply with respect to land in more than one region” if the regulations divide the area of the jurisdiction of the board into prescribed regions.

Finally, “education development charges collected under an education development charge by-law that applies to land in a region shall not, except with the prior written approval of the Minister, be used in relation to land that is outside that region” and “money from an EDC account established under section 16(1) of O.Reg. 20/98 may be used only for growth-related net education land costs attributed to or resulting from development in the area to which the EDC by-law applies” (as amended by O.Reg. 193/10).

Maps 3-1 to 3-2 found at the end of this chapter, outline the geographic jurisdiction analyzed in this EDC Background report.

### 3.2 Analysis of Pupil Accommodation by “Review Area”

In order to attribute the number of pupil places that would be “available and accessible” to new development, within the areas in which development occurs, the area for which the Board’s EDC by-law will apply has been divided into sub-areas, referred to in the EDC submission as “review areas.” Within each review area, the total OTG capacity of all existing permanent accommodation is considered to be the total available capacity of the Boards for instructional purposes and required to meet the needs of the existing community. The Board is entitled to remove any capacity that is not available to be used to accommodate growth-related pupils. As such, the use of permanent accommodation spaces within a review area is based on the following priority:

1. The needs of the existing community (at the end of the 15-year forecast period) must take priority over the needs resulting from new development in the construction of additional pupil places.

2. Pupils generated from new development fill any surplus available OTG capacity.
3. Pupils generated from new development within the review area must take priority over the “holding” accommodation needs of other review areas.

The remaining pupil spaces required as a result of new development within the review area, or net growth-related pupil place requirements, are to be potentially funded through education development charges.

The review area concept within education development charges is based on the premise that pupils should, in the longer term, be able to be accommodated in permanent facilities within their resident area; therefore, any existing available capacity within the review area is not accessible to accommodation needs outside of the review area. For the purposes of the calculation of education development charges described in this report, pupils of the Board who currently attend school facilities outside of their resident area, have been transferred back if the holding situation is considered to be temporary in nature.

There are four important principles to which the consultants have adhered in undertaking the EDC calculation on a review area basis:

1. Capacity required to accommodate pupils from existing development should not be utilized to provide “temporary” or “holding” capacity for new development over the longer term;
2. Pupils generated by new development should not exacerbate the Board’s current accommodation problems (i.e., an increasing portion of the student population being housed in portables for longer periods of time);
3. Board transportation costs should be minimized;
4. Determining where housing development has occurred or is expected to occur and the specific schools affected by this development.

The rationale for the review area boundaries for the elementary and secondary panels of the Board gave consideration to the following criteria:

- a. A desire by the Board to align feeder school patterns as students move from Kindergarten to elementary and secondary programs (particularly with the implementation of FDK). For the 2014 EDC, boundaries for Review Areas E05A, E05B, S01 and S05 have been realigned to reflect changes in secondary school boundaries and the corresponding feeder schools;

- b. Current school attendance boundaries;
- c. Travel distances to schools consistent with the Board's transportation policies;
- d. Municipal boundaries;
- e. Manmade or natural barriers (e.g. existing or proposed major arterial roadways, expressways such as Highway 401, railway crossings, industrial areas, river valleys, escarpments, woodlots, etc.);
- f. Distance to neighbouring schools;

Secondary review areas are normally larger in size than elementary review areas due to the former having larger school facilities and longer transportation distances. Typically, a cluster of elementary schools are “feeder” schools for a single secondary facility.

For the purpose of the jurisdiction-wide approach to calculating education development charges:

The HWDSB has 17 elementary review areas and 6 secondary review areas as shown on Maps 3-1 and 3-2 at the end of this chapter.

Each review area has been further subdivided in order to determine the net growth-related pupil place need. The determination of net growth-related pupil place needs is therefore concentrated on the school sites where additional site acquisition and/or site development costs would be required to accommodate enrolment growth.

### **Elementary Review Areas**

E01A - Queens Rangers

E01B - Ancaster

E01C - West Glanbrook

E01D - West Hamilton Mountain

E02A - East Waterdown

E02B - West Waterdown

E02C - East Flamborough

E02D - Dundas and West Flamborough

E03A - East Glanbrook

E03B - East Glanbrook and Upper Stoney Creek

E04A - West Hamilton City - Westdale

E04B - Central Hamilton City

E05A - Central Mountain

E05B - East Mountain

E06A - East Hamilton Mountain

E06B - East Hamilton - Lower Stoney Creek

E06C - Winona

**Secondary Review Areas**

S01 - Ancaster - West Hamilton Mountain

S02 - Dundas - Flamborough

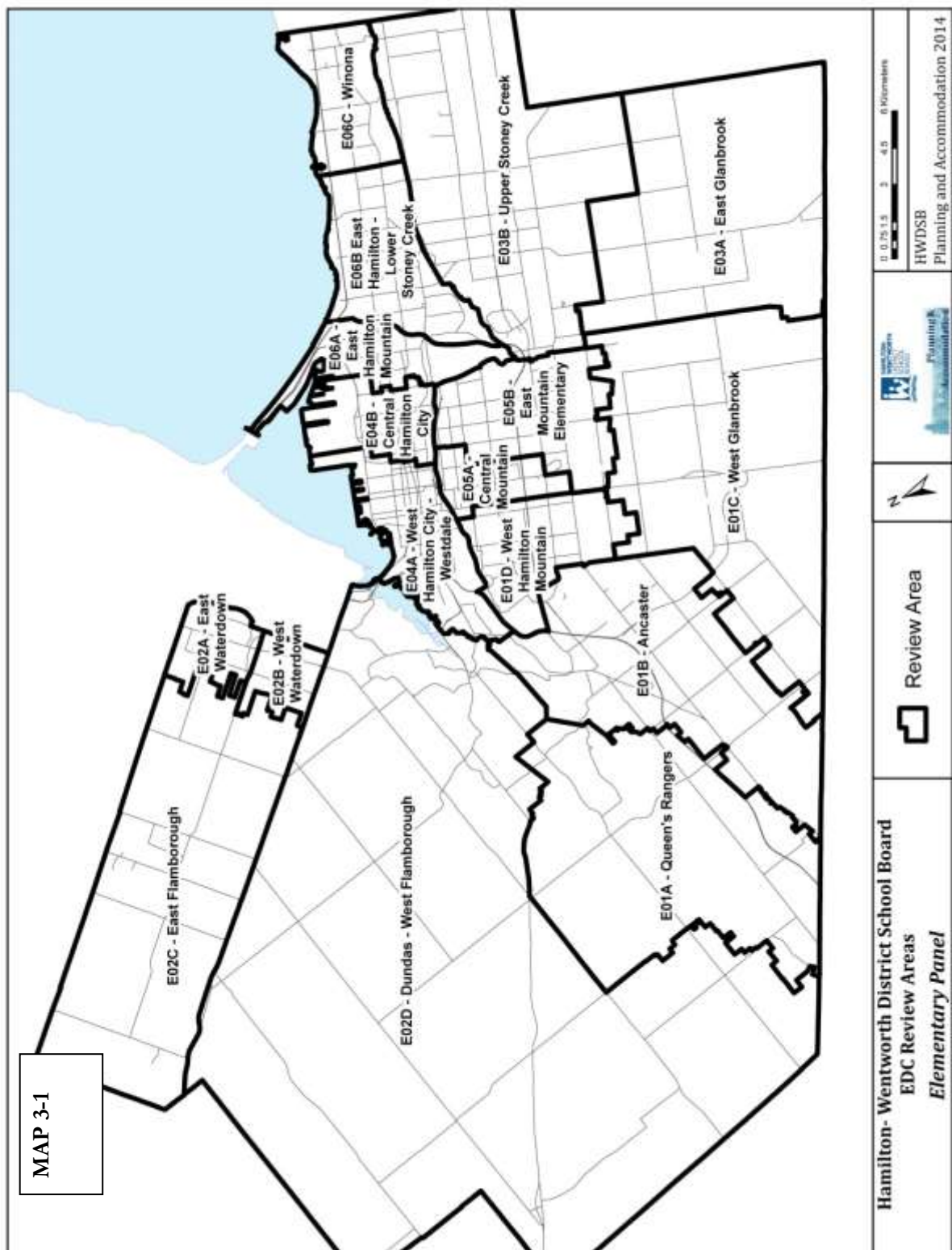
S03 - East Glanbrook - Upper Stoney Creek

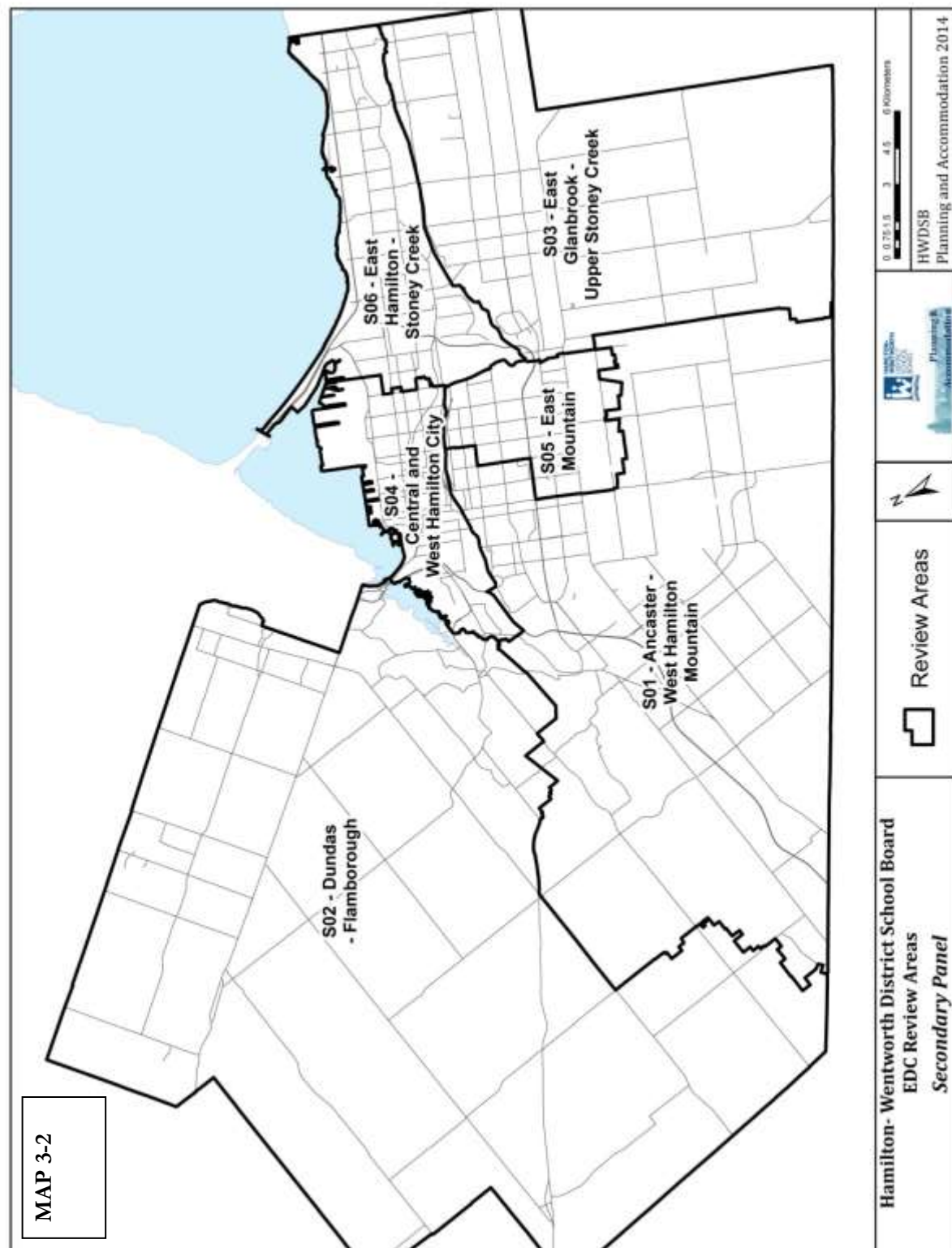
S04 - Central and West Hamilton City

S05 - East Mountain

S06 - East Hamilton - Stoney Creek







## Chapter 4 – RESIDENTIAL / NON-RESIDENTIAL GROWTH FORECAST

### 4.1 Background

This section of the report deals with the forecast of residential and non-residential development over the mid-2014 to mid-2029 fifteen-year forecast period. The parameters of the growth forecasts, particularly with regards to the anticipated timing, location and type of residential development, are critical components of the overall EDC process because of the inextricable link between new units and new pupil places. The location of development is particularly important to the determination of additional growth-related site needs. Therefore, every effort was made to consider a variety of forecasts, planning policies, economic perspectives (short term and longer term), as well as a detailed listing of units in the development approvals forecast supplied by the HWDSB and the Hamilton-Wentworth Catholic District School Board (HWCDSB) planning departments.

### 4.2 Legislative Requirements

As the legislation permits school boards to collect education development charges on both residential and non-residential development, both must be considered as part of the growth forecast as follows:

- “An EDC background study shall include estimates of the anticipated amount, type and location of residential and non-residential development.”; (Section 257.61(2) of the *Education Act*)
- “Estimate the number of new dwelling units in the area in which the charges are to be imposed for each of the 15 years immediately following the day the by-law comes into force.”; (O.Reg 20/98), Section 7(2)
- “If charges are to be imposed on non-residential development, the board shall determine the charges and the charges shall be expressed as either:

- a) a rate applied to the gross floor area (GFA) of the development;
  - b) a rate applied to the declared value of development .” (O.Reg 20/98), Section 7(10)
- “If the board intends to impose different charges on different types of residential development, the board shall determine the percentage of the growth-related net education land cost to be funded by charges on residential development, and that is to be funded by each type of residential development.” (O.Reg. 20/98), Section 9.1
  - “The Board shall choose the percentage of the growth-related net education land costs that is to be funded by charges on residential development and the percentage, if any, that is to be funded by the charges on non-residential development. The percentage that is to be funded by non-residential development shall not exceed 40 percent.” (O.Reg 20/98), Section 7(8))
  - The EDC Guidelines state that “boards are encouraged to ensure that projections for growth are consistent with that of municipalities.”

## 4.3 Residential Growth Forecast and Forms B and C

### 4.3.1 Historical Context

Over the 2004 to 2012 period, new dwelling units in the City of Hamilton were constructed at an average rate of 2,076 units per annum. The composition of units for which building permits were issued between 2004 and 2012 indicates that more than 30.5% were multiple units, 13% apartment units, with the remaining 56.5% of the units are low density units.

**Table 4-1**  
**City of Hamilton**  
**Residential Building Permits, 2004 to 2012**

Year	Residential Units Created			
	Total	Single & Semi Detached	Multiples	Apartments
2004	2,444	1,353	672	419
2005	2,350	1,130	716	504
2006	2,291	1,356	529	406
2007	1,943	1,153	658	132
2008	2,128	1,099	868	161
2009	1,225	723	359	143
2010	2,360	1,503	730	127
2011	1,812	918	463	431
2012	2,131	1,313	692	126
<b>Total: 2004 to 2012</b>	<b>18,684</b>	<b>10,548</b>	<b>5,687</b>	<b>2,449</b>
<b>Average: 2004 to 2012</b>	<b>2,076</b>	<b>1,172</b>	<b>632</b>	<b>272</b>

### 4.3.2 Methodological Approach

The determination of the timing, type and location of development incorporates both a top-down and a bottom-up approach. The following background information was reviewed in establishing the number of units to be constructed and occupied in the City of Hamilton over the 15-year forecast period, as well as the appropriate density mix.

1. City of Hamilton 2014 Development Charges Growth Forecast, November 26, 2013 prepared by Watson & Associates Economists Ltd.

2. The November 2012 Technical Report - Greater Golden Horseshoe Growth Forecasts to 2041, prepared by Hemson Consulting Ltd;
3. Growth Related Integrated Development Strategy: Growth Report, May 2006, Compact Growth Scenario, City of Hamilton

Primary consideration was given to each Board's units in the development approvals process that made up 30,255 of the 50,292 net new dwelling units forecasted to be constructed over the next 15 years. An additional 6,379 units were added in Ward 2 in recognition of the West Harbour Lands and the potential for intensification within the area bounded by Queen St. North to the west, Cannon St. to the north, Wellington Street North to the east and Hunter St. to the south. Finally, an additional 13,658 units were added (4,075 of which were included as additional intensification development potential in Wards 1, 3, 4 and 5) to the development summary in recognition of the housing forecast information arising from the ongoing DC study process. This detailed analysis provided an annualized forecast of units by municipality and by type.

For a more detailed bottom-up perspective on the timing, location and type of development, each Board provided access to their development applications database. This information was used to develop an annual database of proposed housing development by unit type. Subsequently, the timing of development was adjusted to match to the forecast of units by municipality and by type described above. The timing of development was adjusted to match the overall municipal forecasts in five-year increments only (i.e. not annually). Each proposed development was assigned to a HWDSB and existing elementary school, in accordance with existing attendance boundaries.

The following Table 4-2 forecast of net new units was used as the basis for determining projected enrolment from new housing development over the next 15 years and the associated new school sites required to accommodate enrolment growth due to new housing development.

A total of 50,292 net residential units are forecast for the City of Hamilton from 2014/15 to 2028/29. Of these units, some 35.1% will be comprised of single and semi-detached, 31.8% townhouses and other multiples, and 33.1% as high density units (bachelor, 1 and 2+ bedroom apartments).



**Table 4-2**  
**2014/15 - 2028/29 Housing Forecast By Dwelling Type**  
**For EDC Purposes (Net New Units)**

Municipality	Single & Semi Detached	Row Housing (Stacked Townhouses & Townhouses )	Apartments	Totals
<b>Total</b>	<b>17,678</b>	<b>15,987</b>	<b>16,627</b>	<b>50,292</b>
<b>% of Total by Type</b>	<b>35.1%</b>	<b>31.8%</b>	<b>33.1%</b>	<b>100%</b>

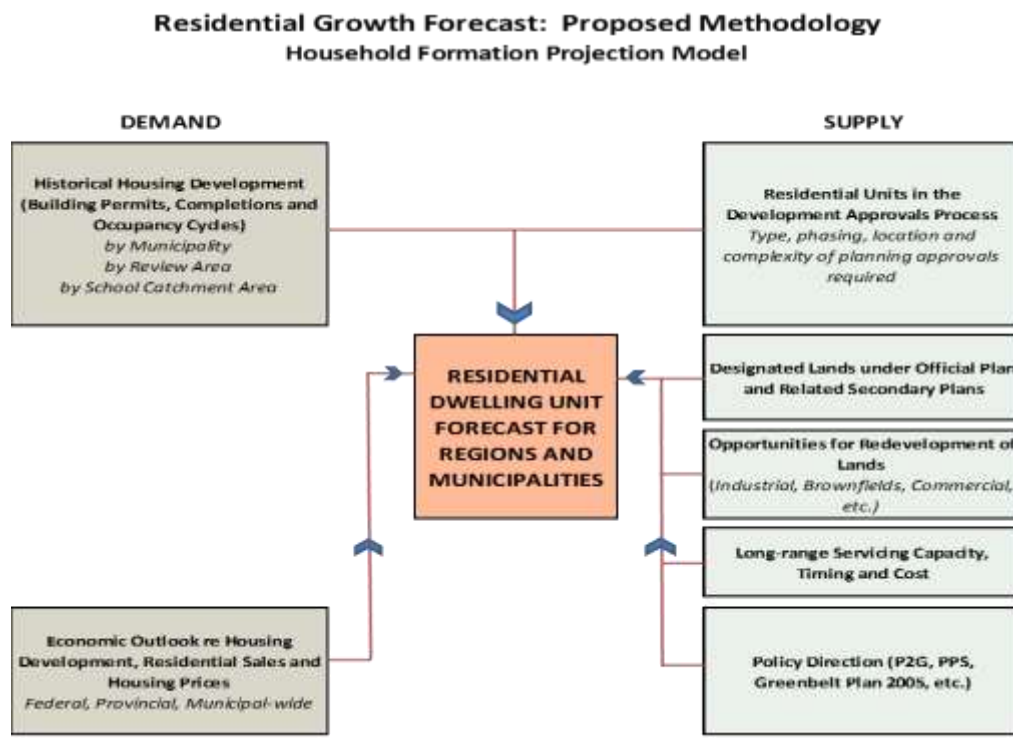
#### 4.3.3 City of Hamilton Residential Land Strategy

The City of Hamilton's May 2006 Growth Related Integrated Development Strategy (GRIDS) is a planning process designed to identify a broad land use structure, associated infrastructure requirements, economic development strategies and the fiscal impact of growth. When considering the implications of future growth, the GRIDS takes into consideration:

- The vacant land supply;
- The potential for residential intensification;
- Employment growth and the potential for household growth in conjunction with the demand for new housing development.

Consistent with land use planning practices, Figure 4-1 illustrates the elements considered in deriving the residential growth forecast for EDC purposes:

**FIGURE 4-1**



## Statutory Residential Exemptions

### *Additional Dwelling Unit Exemption*

Section 257.54 (3) of the *Education Act* exempts, from the imposition of education development charges, the creation of two additional dwelling units within an existing single detached dwelling (i.e. the conversion of a single unit to a duplex or triplex), or one additional dwelling unit within a semi-detached, row dwellings and other residential building. A reduction of 480 medium density units, or 3.0% of the total medium density units, has been made on the EDC dwelling unit forecast.



### *Replacement Dwelling Unit Exemption*

Section 4 of O.Reg 20/98 requires that the Board exempt from the payment of education development charges, the ‘replacement, on the same site, a dwelling unit that was destroyed by fire, demolition or otherwise, or that was so damaged by fire, demolition or otherwise as to render it uninhabitable’, provided that the replacement building permit is issued within two years that the dwelling unit was destroyed or became uninhabitable.

### **4.3.3 Net New Units and Forms B and C**

Table 4-3 summarizes the EDC housing forecast by unit type for the mid-2014 to mid-2029 period. The table also provides a summary of the housing forecast by HWDSB elementary review area.

Table 4-4 which follows, summarizes Forms B and C of the EDC Submission.

**Table 4-3 - NET NEW UNITS BY HWDSB REVIEW AREA**

Review Area	Total Cumulative 15- Year Net New Unit Projections	% Total Forecast Municipal Residential Growth	Low Density (Single & Semi- detached)	Medium Density - Row Houses, Townes, etc.	High Density - Apartment Units
E01A	20	0.04%	20	0	0
E01B	2,228	4.43%	941	890	397
E01C	783	1.56%	172	359	252
E01D	3,263	6.49%	668	778	1,817
E02A	4,897	9.74%	2,117	634	2,146
E02B	2,960	5.89%	1,301	1,335	324
E02C	84	0.17%	84	0	0
E02D	531	1.06%	223	18	290
E03A	5,087	10.11%	2,580	2,426	81
E03B	10,270	20.42%	4,523	4,060	1,687
E04A	8,707	17.31%	530	566	7,611
E04B	432	0.86%	0	0	432
E05A	446	0.89%	227	174	45
E05B	1,852	3.68%	1,622	193	37
E06A	34	0.07%	22	12	0
E06B	2,299	4.57%	326	886	1,087
E06C	6,399	12.72%	2,322	3,656	421
<b>TOTAL</b>	<b>50,292</b>	<b>100.00%</b>	<b>17,678</b>	<b>15,987</b>	<b>16,627</b>

**TABLE 4-4**  
Hamilton-Wentworth District School Board  
Education Development Charges Submission 2014  
Forms B/C - Dwelling Unit Summary

**PROJECTION OF NET NEW DWELLING UNITS<sup>1</sup>**

	Year 1 2014/ 2015	Year 2 2015/ 2016	Year 3 2016/ 2017	Year 4 2017/ 2018	Year 5 2018/ 2019	Year 6 2019/ 2020	Year 7 2020/ 2021	Year 8 2021/ 2022	Year 9 2022/ 2023	Year 10 2023/ 2024	Year 11 2024/ 2025	Year 12 2025/ 2026	Year 13 2026/ 2027	Year 14 2027/ 2028	Year 15 2028/ 2029	Total All Units
<b>Singles</b>	1,051	1,177	1,140	1,189	1,100	938	1,133	1,009	910	1,017	1,397	1,306	1,371	1,477	1,463	17,678
<b>Medium Density</b>	830	946	1,004	1,023	954	1,133	1,255	1,174	1,296	1,103	1,200	989	1,162	1,176	1,222	16,467
<i>Less: Intensification Adjustment</i>																-480
<b>Apartments</b>	299	485	286	902	1,083	1,398	1,065	1,337	1,342	1,125	1,276	1,247	1,488	1,624	1,670	16,627
<b>Total</b>	<b>2,180</b>	<b>2,608</b>	<b>2,430</b>	<b>3,114</b>	<b>3,137</b>	<b>3,469</b>	<b>3,453</b>	<b>3,520</b>	<b>3,548</b>	<b>3,245</b>	<b>3,873</b>	<b>3,542</b>	<b>4,021</b>	<b>4,277</b>	<b>4,355</b>	<b>50,292</b>

Grand Total Gross New Units in By-Law Area	50,772
Less: Statutorily Exempt Units in By-Law Area	-480
<b>Total Net New Units in By-Law Area</b>	<b>50,292</b>

Notes: 1. Assumed to be net of demolitions and conversions.

## 4.4 Non-Residential Growth Forecast and Form D

The non-residential growth forecast indicates that a total of 31,359,550 square feet of non-residential gross floor area (GFA) space is anticipated for the City of Hamilton over the 15 year forecast period. Industrial and institutional additions, municipal and school board properties, which are exempt under the legislation, are expected to total 7,927,398 square feet of GFA over that same time period. Therefore, an education development charge by-law can be applied against a net of 23,432,152 square feet of net gross floor area. The non-residential growth forecast was taken from the 2014 City of Hamilton DC forecast and interpolated to determine the forecast of non-residential GFA over the 15-year forecast period.

This 15 year projection of additions non-residential gross floor area, with assumed statutory exemptions is set out on Table 4-5 which summarizes Form D (Table 4-6) of the EDC Submission below:

**TABLE 4-5**  
**CITY OF HAMILTON**  
**Determination of Non-Residential GFA (2014-2029)**

	Industrial	Commercial	Institutional	Total
Projected Gross Floor Area	21,674,721	6,478,400	3,206,429	31,359,550
As % of Total GFA	69%	21%	10%	
Less Exempted	5,201,933		2,725,465	7,927,398
As % of Total Exempted	24%		85%	
<b>Net Estimated GFA</b>	<b>16,472,788</b>	<b>6,478,400</b>	<b>480,964</b>	<b>23,432,152</b>

**TABLE 4-6**  
**Hamilton-Wentworth District School Board**  
**Education Development Charges Submission 2014**  
**Form D - Non-Residential Development**

**D1 - Non-Residential Charge Based On Gross Floor Area (sq. ft.)**

<b>Total Estimated Non-Residential Board-Determined Gross Floor Area to be Constructed Over 15 Years From Date of By-Law Passage:</b>	31,359,550
<b>Less: Board-Determined Gross Floor Area From Exempt Development:</b>	7,927,398
<b>Net Estimated Board-Determined Gross Floor Area:</b>	23,432,152

## Chapter 5 – DEMOGRAPHIC TRENDS AND FUTURE ENROLMENT EXPECTATIONS

### 5.1 Demographic and Enrolment Trends

The Hamilton-Wentworth District School Board is located in southern Ontario and encompasses the City of Hamilton (former municipalities of Ancaster, Dundas, Flamborough, Glanbrook, Hamilton and Stoney Creek). The Board, with a total 2013-14 ADE enrolment of 50,036 students (34,303 elementary and 15,733 secondary) currently operates 95 elementary and 20 secondary schools.

This chapter will include historical demographic information for the City of Hamilton and the historical enrolment for the HWDSB with emphasis on the information gathered from Statistics Canada.

#### 5.1.1 Overview

The consultants have been retained to prepare long term (i.e., 15-year) enrolment projections for the Board. The analysis set out herein examines both historic demographic and enrolment trends within the Board's jurisdiction and uses this information (along with forecasts about how these enrolment influences are likely to change), in order to derive by school, by grade enrolments.

The consultants acquired detailed information respecting households and population data from the 1996, 2006 and 2011 Census information in order to assess historical trends, school age population by dwelling unit type and by sub-geography for the purposes of determining appropriate pupil yield cycles to be applied to the housing forecast.

The key elements of historical trends (both demographic and enrolment) are examined below. Firstly, ***demographic trends*** are assessed in terms of:

What has been the ***change in pre-school and school age population***, for the jurisdiction as a whole, and for sub-geographies within the Board's jurisdiction? Many school boards can and will experience areas of school age population growth offset by areas of decline. Further, it is possible to experience growth in secondary school age children due to in-migration, but a decline in elementary school age population.

More importantly, what has been the ***change in pre-school and school age population per household***? It is possible to experience significant new housing construction and yet experience a decline in school age population per household due to an aging population driving the demand for a portion of the new housing.

How have **migrations trends** changed as a whole and by age cohort? How has the economy affected the in-migration and out-migration of persons between the ages of 20 to 35 (i.e., those who account for the majority of the household births)? Has the **ethnic make-up of the migrant population** changed and if so, how might this affect projected enrolment for the Catholic Board in particular? What is the **religious affiliation of the migrant population**? It should be noted that religion is only asked every second Census undertaking and that this did occur in the 2011 Census.

How has the **birth rate** (i.e., the number of children born annually) and the **fertility rate** (i.e., the number of children a female is likely to have in her lifespan) changed for particular age cohorts? For example, in many areas, the birth rate has declined in recent years, while the fertility rate in females over the age of 35 has been increasing. Generally the data indicates that, for the majority of the Province, women are initiating families later on in life and, in turn, having fewer children overall.

Secondly, **enrolment trends** are assessed in terms of:

How has the **grade structure ratio** (i.e., the number of pupils entering Junior Kindergarten versus the number of students graduating Grade 8) of the Board changed?

Have changes in **program delivery** affected the Board's enrolment patterns (e.g., French Immersion)?

How has the Board's **share of elementary/secondary enrolment** changed vis-à-vis the co-terminous boards and private school/other enrolment?

### **5.1.2 Population and Housing**

Statistics Canada released the population and dwelling unit data related to the 2011 Census undertaking. This data enables the consultants to assess changing demographic trends at the municipal level (i.e., to get to the question of how changing demographics will affect the school-age population of sub-geographic areas within the two counties). This information is one of the sources of the school and pre-school age population trends discussed herein as they relate to the Board's jurisdiction.

Table 5-1 compares the pre-school and school age population between 1996-2001, 2001-2006 and 2006-2011 Census periods, illustrating the changing trends which will impact future enrolment growth for the Board. As shown in the table, the pre-school age population (ages 0-3) decreased by 1,040 persons or 4.6% between 2001 and 2006 and increased between 2006 and 2011 by 495 persons or 2.3%. The overall decrease in the pre-school aged cohort in the HWDSB's jurisdiction will have a negative impact on the number of students entering Junior Kindergarten (which will also impact the number of pupils requiring JK/SK spaces under the Province's FDK initiative).

The elementary school age population (ages 4-13) decreased by 3,865 persons or 5.9% from 2001 to 2006. This same age group continued to experience a decrease between the 2006 and 2011 Census period when the

cohort decreased by 3,950 persons more than the 2001-2006 trend for 0-3 year olds as they age. Enrolment at the secondary panel will eventually be impacted by this decrease in the total number of elementary school age children as these students continue to make their way through the school system.

From 2001 to 2006 the secondary school age population (ages 14-17) increased by 1,390 persons or 5.2%. During the 2006 to 2011 Census period, secondary school age population continued to decrease by 970 persons or 3.4%.

Table 5-1 also calculates the school age population per household. It is important to evaluate the change in the school age population measured against the change in the number of occupied households. Significant housing development may not translate into a proportionate increase in school age population, especially if a significant portion of the development is higher priced condo/high-rise apartments. Analysis of the population by household indicates that during the 2001 to 2006 Census period, the total pre-school age population (ages 0-3) per household within the City of Hamilton declined by 7.0%, followed by a 3.1% continued decline between 2006 to 2011.

The number of elementary students (ages 4-13) per household decreased during both Census periods by 8.3% and 11.4% respectively.

Population per household for the 14-17 year old age cohort increased by 2.5% between the 2001 and 2006 Census periods and conversely decreased during 2006 and 2011 Census period by 8.5%.

TABLE 5-1

Note: Figures do not include the Census Undercount



### 5.1.3 Births

According to the Statistics Canada, the total number of children born annually in the City of Hamilton decreased from 5,291 in 2001 to 4,903 in 2010 as shown in Table 5-2. This represents a 7% overall decrease in the number of live births over this same time frame. All age groups experienced a decrease in the total annual number of live births between 2001 and 2010, except for women aged 40-44.

**TABLE 5-2**  
**City of Hamilton**  
**Births by Age of Mother**

Year	Total	0-19	20-24	25-29	30-34	35-39	40-44	45-49	Unknown
2001	5,291	240	812	1,533	1,766	826	114	-	-
2002	5,152	226	778	1,581	1,687	752	128	-	-
2003	5,199	216	744	1,524	1,749	822	135	4	5
2004	5,059	189	688	1,508	1,745	779	142	-	8
2005	5,095	198	710	1,577	1,648	810	152	-	-
2006	4,993	206	737	1,402	1,664	845	139	-	-
2007	5,081	228	718	1,532	1,644	801	158	-	-
2008	4,821	211	709	1,422	1,609	724	146	-	-
2009	4,862	198	711	1,407	1,638	770	138	-	-
2010	4,903	214	686	1,467	1,594	771	171	-	-
2001-2010	50,456	2,126	7,293	14,953	16,744	7,900	1,423	4	13

Source: Statistics Canada, Births by Age of Mother

S:\HWD58 2013\Census\HWD58 Census Information.xlsx|5-2 Births by Age of Mother

### 5.1.4 Migration Patterns

Table 5-3 compares the migration patterns between the International, Interprovincial and Intraprovincial population from 2009/10 to mid-2012/13. As indicated in Table 5-3, total net migration in the area has increased over the past four years from 2,146 in 2009/10 to 3,303 persons in 2012/13. The *natural population increase* (difference between the number of births and deaths) has increased by 310 for the same time period.

**Table 5-3**  
**City of Hamilton**  
**Net Migration Patterns by Total Population**

	2009/2010	2010/2011	2011/2012	2012/2013
City of Hamilton				
International	2,769	3,066	2,891	2,345
Interprovincial	-627	-332	-554	-949
Intraprovincial	4	709	905	1,907
Total Migration	2,146	3,443	3,242	3,303
Natural Increase	959	1,006	959	1,269

### **5.1.5 Enrolment Overview**

Historical elementary by grade enrolments (2009/10 to 2013/14) for the HWDSB have been summarized in Tables 5-4. Table 5-4 outlines the total by grade elementary enrolment for the Board. Between 2009/10 and 2013/14, the elementary panel has increased by 636 students or 1.9%.

**TABLE 5-4**  
**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD**  
**Historical Elementary Enrolment, 2009/10 to 2013/14**

HWDSB Grade	Historical 2009/10	Historical 2010/2011	Historical 2011/2012	Historical 2012/2013	Current 2013/2014
JK	2,906	3,057	3,171	3,125	3,285
SK	3,252	3,274	3,335	3,466	3,411
1	3,403	3,258	3,276	3,396	3,460
2	3,215	3,427	3,340	3,317	3,437
3	3,440	3,238	3,443	3,344	3,331
4	3,326	3,436	3,241	3,431	3,370
5	3,377	3,310	3,409	3,210	3,407
6	3,579	3,379	3,335	3,412	3,198
7	3,542	3,621	3,417	3,345	3,426
8	3,627	3,557	3,657	3,424	3,351
SE	793	758	707	705	627
<b>Total</b>	<b>33,667</b>	<b>33,557</b>	<b>33,624</b>	<b>33,470</b>	<b>34,303</b>
GSR	0.890	0.908	0.940	0.981	1.018

Source: Hamilton-Wentworth District School Board

Enrolment at the secondary panel as evidenced in Table 5-5 has decreased by 1,083 students or 6.2% between 2009/10 and 2013/14. In part, this reflects HWDSB's historical decline in elementary enrolment negatively impacting on secondary enrolment as a result of smaller graduating elementary classes moving into the secondary school environment.

**TABLE 5-5**  
**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD**  
**Historical Elementary Enrolment, 2009/10 to 2013/14**

HWDSB Grade	Historical 2009/10	Historical 2010/2011	Historical 2011/2012	Historical 2012/2013	Current 2013/2014
9	3,765	3,722	3,578	3,592	3,395
10	3,905	3,828	3,767	3,621	3,673
11	3,970	3,955	3,873	3,796	3,720
12	5,752	5,515	5,293	5,504	5,486
SE	167	193	204	33	201
<b>Total</b>	<b>17,559</b>	<b>17,213</b>	<b>16,715</b>	<b>16,546</b>	<b>16,476</b>

Source: Hamilton-Wentworth District School Board

### **5.1.6 Grade Structure Ratio (GSR)**

In Table 5-4, the change in Grade Structure Ratio (GSR) is shown in each year between 2008/09 and 2013/14. GSR measures the number of pupils entering the elementary system (JK-1) versus the number leaving the elementary system (Grades 6-8). A ratio of 1.0 is indicative of an equal number of pupils entering the system as those leaving the system (i.e., when the information is expressed as average daily enrolment including full-day kindergarten). Further, a ratio of 1.0 in each year is an indicator of stable enrolment, whereas a value less than 1.0 is indicative of a decline in enrolment moving into the secondary panel. Increasing births or net migration, as well as the introduction of programs like full day Kindergarten can alter the GSR.

### 5.1.7 Apportionment

Tables 5-6 outlines the apportionment between primary elementary and secondary service providers in the City Of Hamilton (i.e., includes English language public boards and excludes French language schools, home schooling, institutional, instructional settings, etc.).

Table 5-6 illustrates the historic elementary and secondary patterns for the HWDSB and the Hamilton-Wentworth Catholic District School Board between 2009/10 and 2013/14 as reported by each school board. Over this time frame, HWDSB increased its apportionment share by 0.7% on the elementary panel. Similarly, the Board's apportionment share has decreased at the secondary panel over the same timeframe by 0.2%.

**TABLE 5-6**  
**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD**  
**AND HAMILTON-WENTWORTH CATHOLIC DISTRICT SCHOOL BOARD**  
**Historic Annual Enrolment , 2009/2010 to 2013/14 Apportionment**

Apportionment							Change
		2009/10	2010/2011	2011/2012	2012/2013	2013/2014	2009 -2013 % change
<b><i>Elementary Panel</i></b>							
HWDSB	Enrolment	33,667	33,557	33,624	33,470	34,303	636
	<b>Apportionment</b>	<b>64.0%</b>	<b>64.3%</b>	<b>64.5%</b>	<b>64.3%</b>	<b>64.7%</b>	<b>0.7%</b>
HWCDSB	Enrolment	18,921	18,607	18,540	18,592	18,680	-241
	<b>Apportionment</b>	<b>36.0%</b>	<b>35.7%</b>	<b>35.5%</b>	<b>35.7%</b>	<b>35.3%</b>	<b>-0.7%</b>
Elementary Enrolment		52,588	52,164	52,164	52,062	52,983	395
Elementary Apportionment		100.0%	100.0%	100.0%	100.0%	100.0%	
<b><i>Secondary Panel</i></b>							
HWDSB	Enrolment	17,559	17,213	16,715	16,546	16,476	-1,083
	<b>Apportionment</b>	<b>61.9%</b>	<b>61.6%</b>	<b>61.3%</b>	<b>61.3%</b>	<b>61.7%</b>	<b>-0.2%</b>
HWCDSB	Enrolment	10,818	10,734	10,539	10,435	10,223	-595
	<b>Apportionment</b>	<b>38.1%</b>	<b>38.4%</b>	<b>38.7%</b>	<b>38.7%</b>	<b>38.3%</b>	<b>0.2%</b>
Secondary Enrolment		28,377	27,947	27,254	26,981	26,699	-1,678
Secondary Apportionment		100.0%	100.0%	100.0%	100.0%	100.0%	

Source: Hamilton-Wentworth District School Board, 2013. Hamilton-Wentworth Catholic District School Board, 2013.

## 5.2 Projections of Pupil Accommodation Needs

The end of this chapter summarizes the elementary and secondary enrolment projections for the HWDSB.

### 5.2.1 Methodology

The derivation of by-school and by-grade enrolment projections consists of two distinct methodological elements. The first is based on a retention rate approach to determine how the existing pupils of the Board (i.e., pupils resident in existing housing within the Board's jurisdiction, as well as any pupils who reside outside of the Board's jurisdiction but attending schools of the Board) would move through each grade and transition from the elementary to the secondary panel, including changes in apportionment. This element of the enrolment projection methodology is known as the "Requirements of the Existing Community." The second part of the projection exercise is to determine how many pupils would be generated by new housing development over the forecast period, and what portion of these pupils would potentially choose to attend schools of the Board. This element of the forecasting exercise is known as the "Requirements of New Development." The EDC Guidelines require that each projection element be examined separately. The methodological approach to each element is examined in depth below.

#### Requirements of the Existing Community

The enrolment projections of the existing community are intended to reflect the predicted change in enrolment pertaining to housing units that have previously been constructed and occupied within the Board's jurisdiction. This differs from the pupil place requirements of new development, which reflect the anticipated enrolment to be generated from new housing units to be constructed over the next 15 years. Existing community projections may also include some pupils who live outside of the Board's jurisdiction, but attend schools of the Board.

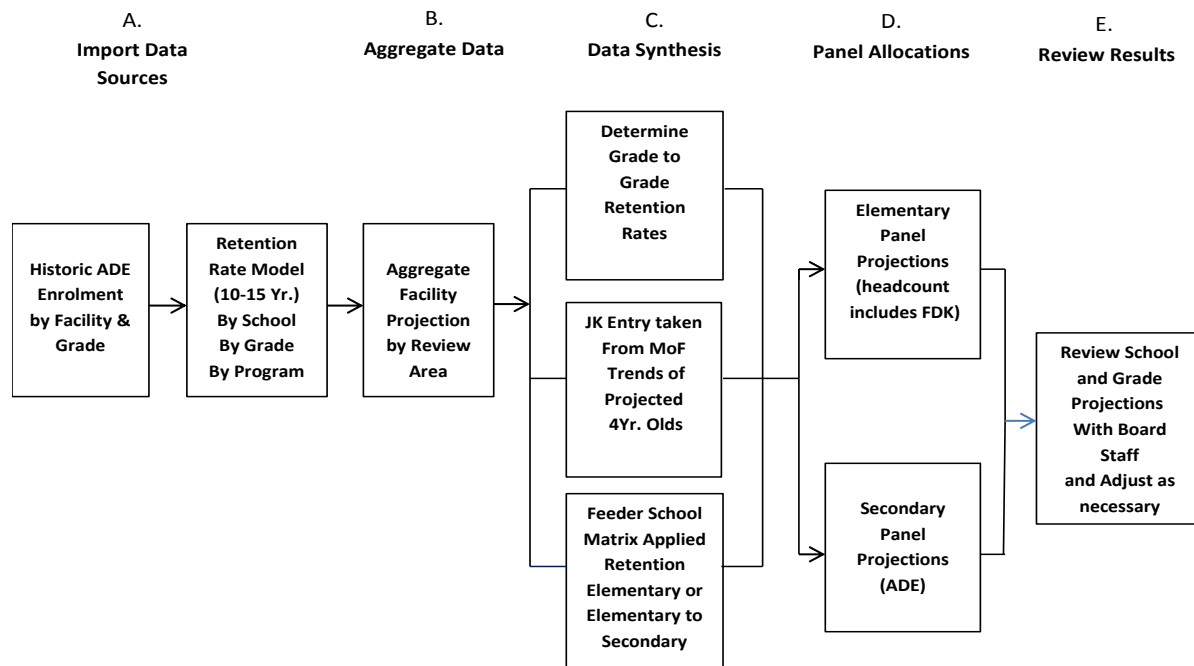
The key components of the existing community projection model are outlined in Figure 1.

1. Enrolment projections disaggregated by sub-geography (i.e., review areas).
2. Historic average daily enrolment by school and by grade. This information is verified against the Board's Financial Statements. The enrolment summaries are used to determine how changes in the provision of facilities and programs, as well as school choice, have affected student enrolment to

date. This information also provides perspectives on how board apportionment has changed throughout the jurisdiction and by sub-area. This information provides an indication of holding situations where pupils are provided with temporary accommodation awaiting the construction of additional pupil spaces.

**FIGURE 1**

**PUPIL REQUIREMENTS OF THE EXISTING COMMUNITY**



- Historic retention rates by school, by grade and by program -- has the number of students moving through from grade to grade been more or less than previous years? Have changes to program offering affected the Board's share of enrolment at any particular school?
- Apportionment by sub-area -- boards are asked to provide several years of data indicating student enrolment by school and by program, based on where pupils reside. This data provides the most accurate assessment of the Board's apportionment share by sub-geography. There are five (5) education service providers in this jurisdiction (i.e., two English-language, two French-language, plus private school, home school, etc.). The cumulative apportionment share of each service provider must equal 100%.

5. Feeder school retentions for each elementary and secondary school -- this includes pupils feeding into specialized programs (e.g., French Immersion, Extended French, Gifted, etc.) and from elementary schools into secondary schools. The secondary enrolment projections are a direct function of the elementary enrolment projections where Grade 8 pupils feed into secondary schools. Typically Grade 8 students are directed to a preferred secondary school based on a board's attendance boundaries. However, "open access" policies at the secondary level often permit students to attend their school of choice (which could include a co-terminous board's secondary school).
6. Historical enrolment anomalies and the ability to document unusual shifts in enrolment at any individual school due to changes in program, staffing, transportation, policies etc.

Long term enrolment projections for each elementary and secondary school were subsequently reviewed with the Board's staff and refined as necessary.

### **Requirements of New Development**

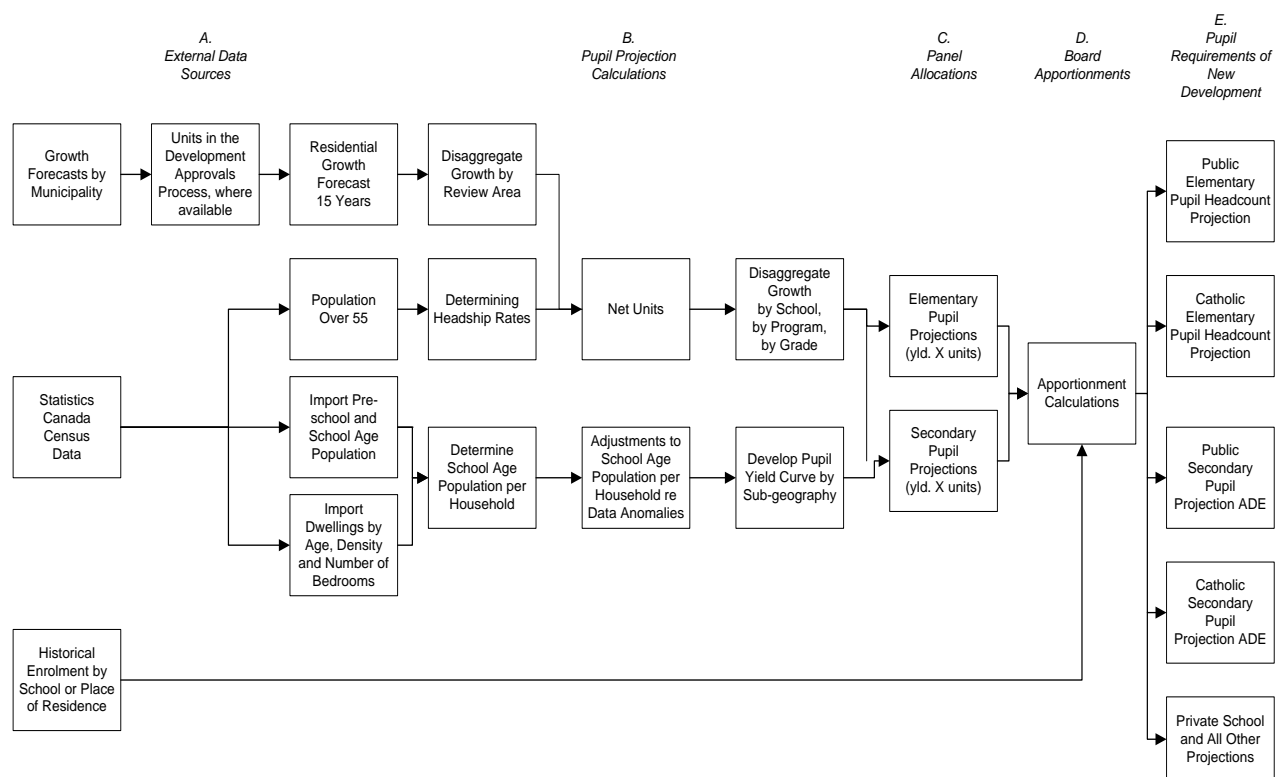
The projected enrolment supporting the "requirements of new development" is intended to determine the number of pupils that would occupy new housing development, and the percentage of these pupils that are likely to attend schools of the Board. Some of these pupils may be held in existing schools of the Board, awaiting the opening of new neighbourhood schools.

The key components of the new development projection model are outlined in Figure 2.

1. Units in the development approvals process -- this information was provided by the City of Hamilton, and is used as one of the considerations in deriving the detailed fifteen-year housing forecast by location and by unit type. Finally, the development information was provided by dwelling unit type (e.g., low, medium and high density) which is critical to determining appropriate student yields to be generated by the development.
2. Municipal growth forecast – City of Hamilton 2014 Development Charges Growth Forecast, November 26, 2013 prepared by Watson & Associates Economists Ltd. and Growth Related Integrated Development Strategy: Growth Report, May 2006, Compact Growth Scenario, City of Hamilton.

3. Other housing and population forecasts, The November 2012 Technical Report - Greater Golden Horseshoe Growth Forecasts to 2041, prepared by Hemson Consulting Ltd.
4. Both the units in the development approvals process and the 15-year municipal housing forecasts (i.e., by type, where available) are used to determine the number of new dwelling units to be constructed by review area.

**FIGURE 2**  
**PUPIL PLACE REQUIREMENTS OF NEW DEVELOPMENT: CONCEPTUAL SCHEMATIC**



The 15-year housing projections typically do not match on an annual basis (i.e., phasing of approved development may differ from projected timing of development). However, they are matched by dwelling unit type and total number of units for each 5-year increment, where feasible, and always match to the 15-year projection totals.

5. Custom tabulated Statistics Canada data provides detailed information respecting the number of occupied households and the period constructed, household density, the number of bedrooms and



the age of the occupants. This information is used to determine historic pupil generation factors (i.e., the total number of school-age children occupying a given household unit) by density and period of construction, as well as headship rates (i.e., the age of the household maintainers) by sub-geography. Pupil yield (i.e., the number of school-age children of the board occupying a given household unit) and pupil yield curves are derived over the fifteen-year forecast period, giving consideration to density type, declining ppu's, age of the dwelling unit and the occupancy cycle of the dwelling unit. A more detailed discussion is set out below.

### **The New Unit Pupil Yield Cycle**

Figure 3 translates the impact of the single detached unit occupancy trend to a conceptual representation of the pupil yield cycle for these types of dwelling units. This figure illustrates a typical yield cycle for a new single detached dwelling unit, commencing at initial occupancy of the unit. In reality, there are several variables that affect the overall pupil yield cycle. Firstly, most new communities are constructed over periods of 5 to 15 years, so that the aggregated overall pupil yield of even a community comprised entirely of single detached units will represent an amalgamation of units at different points on the pupil yield cycle. It should be noted that new communities are generally comprised of:

- Units constructed and occupied at different times;
- Development of varying densities (low, medium or high);
- There are particular types of units with low “initial” yield occupancies (e.g., adult lifestyle, recreational, granny flats, etc.).

The second variable is that there are basically two pupil yield cycles that have historically affected single detached units in newer communities: the primary cycle, which occurs over the (approximate) first 15-20 years of community development; and the sustainable cycle, which occurs after that point.

The primary yield cycle for elementary pupil yields in new single detached units generally peaks within the first 7 to 10 years of community development, depending on the timing of occupancy of the units. Recent demographic and occupancy trends, however, suggest that the family creation process is being delayed as many families are postponing having children and also having less children (as witnessed by declining fertility

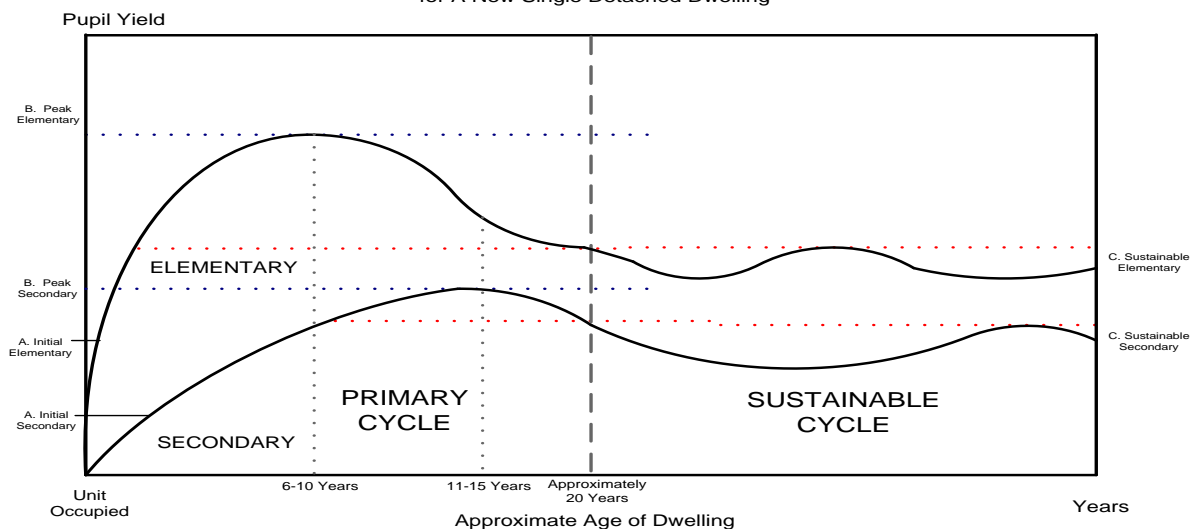
rates). Also, lower mortgage interest rates over the past few years have allowed buyers to purchase homes in advance of the intention to create families.

“Peak” yields may remain relatively constant over several years, particularly in periods of sustained economic growth. Eventually, however, the elementary yield would gradually decline until it reaches the end of the initial yield cycle and moves to the first stage of the sustainable yield cycle. The initial yield cycle of secondary pupils peaks in approximately year 12 to 15 of new community development (depending on the timing of occupancy of the units), and experiences a lower rate of decline than the elementary panel, before reaching the sustainable yield cycle.

The second phase, the sustainable yield cycle for both the elementary and secondary panels appears to maintain the same peaks and valleys. However, the peak of the sustainable cycle is considerably lower than the primary peak for the community.

Accordingly, the overall blended pupil yield for a single community will incorporate the combination of these factors. Pupil yields applicable to different communities will vary based on these (and other) demographic factors. Pupil generation in the re-occupancy of existing dwelling units can vary from its initial occupancy. For these reasons, an overall pupil yield generally reflects a weighting (i.e. the proportion of low, medium and high density units constructed each year) and blending of these variables.

Figure 3  
Conceptual Representation of the Pupil Yield Cycle  
for A New Single Detached Dwelling



### **Calculation of Pupils Generated from Requirements of New Development**

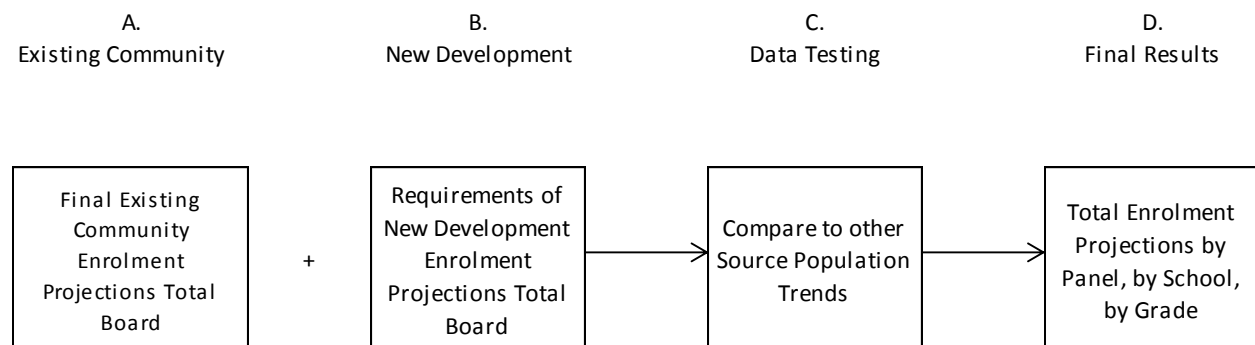
1. Statutorily-exempt units are removed from the gross. The resultant projection of dwelling units is known as the “net units.”
2. Historical enrolment by place of residence is requested from each co-terminous board. This information, along with the Census data, is used to determine apportionment applicable to the Board in each review area.
3. The pupil yields are adjusted to account for the apportionment share for the Board by density type. The yields are multiplied by the forecast of new dwelling units by type, by year, in order to derive enrolment projections from new development for the Board.

### **Total Student Enrolment Projections**

The projected “requirements of the existing community” are added to the total “requirements of new development” by school and by grade, to determine total projected enrolment over the forecast period, as shown in Figure 4.

This information is reviewed in detail with Board staff. The enrolments are adjusted, where necessary.

FIGURE 4



### 5.2.2 Summary of Board Enrolment Projections

Summaries of the total enrolment, based on the provision of full-day Kindergarten for 4- and 5- year olds for the HWDSB, are provided in Table 5-7 for the elementary and secondary panels.

The total EDC elementary enrolment projections indicate that by the end of the 15-year forecast period, the HWDSB will have a total enrolment of 39,604 students for an increase of 5,275 students from the 2014/15 enrolment of 34,329. The Board is expected to experience a decrease of about 2,105 students in the existing community, which is projected to be enhanced by an additional 7,796 pupils from new housing development.

On the secondary panel, the Board forecasts a decrease of 2,224 students in the existing community and 2,684 additional students to come from new development over the next 15 years. This results in a total projected year 15 enrolment of 16,028 students on the secondary panel, an increase of about 353 students from the 2014/15 enrolment.

**Table 5-7**  
**Hamilton-Wentworth District School Board**  
**Projected Enrolment**

	Current 2013/ 2014	Year 1 2014/ 2015	Year 2 2015/ 2016	Year 3 2016/ 2017	Year 4 2017/ 2018	Year 5 2018/ 2019	Year 6 2019/ 2020	Year 7 2020/ 2021	Year 8 2021/ 2022	Year 9 2022/ 2023	Year 10 2023/ 2024	Year 11 2024/ 2025	Year 12 2025/ 2026	Year 13 2026/ 2027	Year 14 2027/ 2028	Year 15 2028/ 2029
Elementary Panel																
Existing	34,303	33,913	33,431	33,173	32,751	32,426	32,194	31,954	31,673	31,448	31,249	31,347	31,462	31,589	31,706	31,808
Requirement of New Development		416	900	1,367	1,873	2,342	2,829	3,380	3,896	4,398	4,888	5,476	6,007	6,589	7,185	7,796
<b>Total</b>	<b>34,303</b>	<b>34,329</b>	<b>34,331</b>	<b>34,540</b>	<b>34,624</b>	<b>34,769</b>	<b>35,024</b>	<b>35,333</b>	<b>35,569</b>	<b>35,847</b>	<b>36,137</b>	<b>36,823</b>	<b>37,470</b>	<b>38,178</b>	<b>38,892</b>	<b>39,604</b>

	Current 2013/ 2014	Year 1 2014/ 2015	Year 2 2015/ 2016	Year 3 2016/ 2017	Year 4 2017/ 2018	Year 5 2018/ 2019	Year 6 2019/ 2020	Year 7 2020/ 2021	Year 8 2021/ 2022	Year 9 2022/ 2023	Year 10 2023/ 2024	Year 11 2024/ 2025	Year 12 2025/ 2026	Year 13 2026/ 2027	Year 14 2027/ 2028	Year 15 2028/ 2029
Secondary Panel																
Existing	15,733	15,569	15,583	15,021	15,225	15,168	14,803	14,845	14,638	14,570	14,560	14,322	13,993	13,651	13,324	13,345
Requirement of New Development		106	232	357	493	621	785	965	1,133	1,299	1,455	1,702	1,938	2,187	2,442	2,684
<b>Total</b>	<b>15,733</b>	<b>15,675</b>	<b>15,815</b>	<b>15,377</b>	<b>15,718</b>	<b>15,789</b>	<b>15,588</b>	<b>15,810</b>	<b>15,771</b>	<b>15,869</b>	<b>16,015</b>	<b>16,023</b>	<b>15,931</b>	<b>15,837</b>	<b>15,766</b>	<b>16,028</b>

## Chapter 6 – SITE REQUIREMENTS AND VALUATION

### 6.1 Legislative Requirements

The steps set out in section 7 of O.Reg. 20/98 for the determination of an education development charge requires the Board to “...estimate the net education land cost for the elementary/secondary school sites required to provide pupil places for the new school pupils.”

Section 257.53(2) specifies the following as education land costs if they are incurred or proposed to be incurred by a Board:

1. Costs to acquire land or an interest in land, including a leasehold interest, to be used by the board to provide pupil accommodation.
2. Costs to provide services to the land or otherwise prepare the site so that a building or buildings may be built on the land to provide pupil accommodation.
3. Costs to prepare and distribute education development charge background studies as required under this Division.
4. Interest on money borrowed to pay for costs described in items 1 and 2.
5. Costs to undertake studies in connection with an acquisition referred to in item 1.

Only the capital component of costs to lease land or to acquire a leasehold interest is an education land cost.

Under the same section of the Act, the following are not education land costs:

1. Costs of any building to be used to provide pupil accommodation.
2. Costs that are attributable to excess land of a site that are “not education land costs.” (section 2 subsection 1 of O.Reg. 20/98)

However, land is not excess land if it is reasonably necessary,

- a) to meet a legal requirement relating to the site; or
- b) to allow the facilities for pupil accommodation that the board intends to provide on the site to be located there and to provide access to those facilities.

Finally, the Regulation specifies the following site sizes:

Elementary schools	
Number of Pupils	Maximum Area (acres)
1 to 400	4
401 to 500	5
501 to 600	6
601 to 700	7
701 or more	8

Secondary Schools	
Number of Pupils	Maximum Area (acres)
1 to 1000	12
1001 to 1100	13
1101 to 1200	14
1201 to 1300	15
1301 to 1400	16
1401 to 1500	17
1501 or more	18

Where school sites are situated adjacent to parkland that is available for school program usage, then the foregoing site size limitations are generally reasonable. However, municipalities may be reluctant to allow

shared usage of this land (and many emplace fencing between school sites and parks). In the latter instance, Boards may require site sizes in excess of the maximum prescribed above. In some cases, a portion of the school site may be undevelopable (e.g. environmentally sensitive lands, woodlots, etc.). Changes to program offering often translate into larger school buildings footprints, increased playfield space, parking spaces, site access, etc. The EDC legislation outlines the circumstances under which the acquisition of school sites may exceed the acreage benchmarks outlined above.

The EDC Guidelines (Section 2.3.8) require that “when the area of any of the proposed sites exceeds the site designations in this table (i.e. table above), justification as to the need for the excess land is required.” An explanation is provided on individual Form E F and G’s, where appropriate.

## 6.2 Site Requirements

The site requirements arising from new development in each review area is derived from the cumulative number of new pupil places required by Year 15 of the forecast period. Surplus pupil spaces are those that are “available” to meet some or all of the requirements of new development (where the permanent capacity exceeds the Year 15 enrolment expectations of the existing community), reducing the need for additional sites. Further, new sites may not be required where the Board intends to construct additions to existing facilities to meet all or a portion of the requirements of new development over the forecast period (although, in some cases the acquisition of adjacent property may be required). Even in a greenfield situation, school additions constructed to accommodate enrolment growth may require additional site development (e.g. grading, soil remediation, upgrading hydro services, removal of portables, etc.).

Boards generally acquire sites a minimum of two years in advance of opening a new school facility, in order to ensure that there is sufficient time allowed for site servicing and preparation, facility design, contract tendering, building construction and the capital allocation process. The length of time required to approve development plans, acquire land for school sites, assess site preparation needs, and commence school construction can consume a decade or more, particularly where multi-use developments or redevelopment of lands are proposed, or land assembly is required.

The permanent capacity of each new school to be constructed, proposed additions to meet growth-related needs, the number of eligible pupil places to be funded, and associated land needs under the jurisdiction-wide by-law scenario for the HWDSB is set out in Chapter 7.



## 6.3 Site Valuation

The Board, with the Hamilton-Wentworth Catholic District School Board (HWCDSB), retained the services of the firm Boyak & Associates Limited to undertake an analysis of the growth-related land acquisition costs “proposed to be incurred” (section 257.53(2) of the Education Act) by the Board over the fifteen-year forecast period. Specifically the appraisers were requested to provide an opinion as to market trends for the purpose of estimating the current market value with respect to the HWDSB and HWCDSB Education Development Charges (EDC). The approach considered was based on the Highest & Best Use of land “as if” rezoned for future single family and/or medium density, i.e. townhouse (subject to severance) and values representing servicing, rezoning and development time within approximately a 1 to 2 year period. The following is an excerpt from the Boyak & Associates Limited appraisal report:

The purpose of this letter is to assist the client, the Hamilton-Wentworth District School Board and the Hamilton-Wentworth District School Board, in estimating the current market value of the subject properties under the above Highest & Best Use option. It is assumed that the “severance” of the subjects has been completed. Note: The clients are a prospective purchaser. The valuation analysis herein is for preparation of an EDC By-Law, but not for acquisition purposes in the near future.

“Specifically, the appraisal valuation looked at specific sites and comparable sales in the area. The appraisal criteria included (at client’s request):

- i) Valuation based on imminent (1 – 2 years) development with residential uses
- ii) An annual estimated land escalation rate to be applied to the market value in order to sustain the likely site acquisition costs over the next 5 years”

The term “market value” is defined as being “the most probable price in terms of money which an estate (or interest) in real property should bring in a competitive and open market under conditions requisite to a fair and typical sale between a willing seller and a willing buyer, each acting prudently and knowledgeably and assuring the price is not affected by undue stimuli”. It is also often referred to as the most probable “selling price”.

The purpose of this summary of our Narrative Reports is to provide current market value land ranges for potential Hamilton-Wentworth District School Board & the Hamilton-Wentworth District School Board future school sites. This information will assist in establishing an Educational Development Charge (EDC) By-Law governing the City of Hamilton.

This summary is a result of our 10 Narrative Appraisal Reports which comply with the reporting requirements set forth under the ‘STANDARDS’ of the Canadian Uniform Standards of Professional Appraisal Practice. As such, they will present discussion of the data, reasoning, and analyses that were used in the appraisal process to develop the appraiser’s opinion of value. In accordance with prior agreement between the client and the appraiser, this report is the result of certain extraordinary assumptions that were invoked. This relates to the fact that the sites are assumed to have been severed, serviced to the lot line and that

the valuation is based on the future rezoning to single family/medium density residential with development in 1 to 2 years as the Highest & Best Use. Rezoning and possible official plan and zoning amendment may be required to develop. The sites are assumed as vacant serviceable land, unless otherwise stated, and are assumed to be free and clear of any environmental issues.

Because we are dealing with vacant land, the Income Approach and Cost Approach will not be utilized. Only the Direct Comparison Approach will be relied upon. The intended user of this report is warned that the reliability of the value conclusion provided may be impacted by this departure from the Standards.

As a result of our investigation and analysis of the market and research, it is concluded that the Fee Simple Interest market value estimate for the subject properties as of March 26, 2014, is in the range of:

**Hamilton-Wentworth District School Board Sites**

	<b>Site #1</b>	<b>Site #2</b>	<b>Site #3</b>	<b>Site #4</b>	<b>Site #5</b>
<b>Neighbourhood/ Location</b>	Bellagio Ave. @ Keystone Crescent	3169 Fletcher Road	Part of 435 First Rd. W. @ Green Mountain Rd	Part of 257 Jones Road Fruitland Winona area.	Part of 448 Dundas Street
<b>Estimated Size</b>	8.07±acres*	5.63±acres	6.17±acres	6±acres	5.8±acres
<b>Estimated Rezoning Development &amp; Servicing Timing</b>	Assumed one to two years	Assumed one to two years	Assumed one to two years	Assumed one to two years	Assumed one to two years
<b>Highest &amp; Best Use</b>	Low Density	Low Density	Low Density	Low Density	Low Density
<b>Sale Price per Acre</b>	\$550,000±10%	\$550,000±10%	\$550,000±10%	\$650,000±10%	\$800,000±10%
<b>Total Sale Price</b>	\$4,438,500 ±10%	\$3,096,500 ±10%	\$3,393,500 ±10%	\$3,600,000 ±10%	\$4,464,000 ±10%

*A copy of the Boyak & Associates Limited Report is available upon request.*

For the purposes of the EDC calculation, some of the sites, not included in the appraisal analysis (due to changes in the timing and pace of development), have been included in the EDC calculation, where required.

Future site acquisitions, where no existing option agreement is in place or where expropriation may be needed, are costed on the basis of the research undertaken by the Board's appraiser. The costs are based on valuation estimates of average acreage rates as of May 14, 2014.

### 6.3. Approach

In a greenfield development setting, assumed site acquisition costs underlying the calculation of the education development charge may fall into categories:

1. sites previously purchased by the Board;
2. future site acquisitions specified under option agreement between the Board and a landowner;
3. future site requirements either reserved or designated in a secondary plan, or whose location is, as yet, undetermined;
4. future site requirements where requirement to address identified need would result in friendly or non-friendly expropriations.
5. future sites, identified by a municipality as part of a secondary plan or other planning process;
6. future land purchases proposed to be incurred by a board (section 257.53(2)), where the acquisition of said land is delayed due to land servicing or the planning approvals process (with the proviso that the land be sold at a future date if it becomes clear that the affected lands will not be developed. In this case the value of the EDC funds used to acquire the land must be returned to the EDC account. Any additional land proceeds are to be added to a board's Proceeds of Disposition account and used to fund capital expenditure needs (Section 16.1 of O. Reg 20/98).

The third and fourth categories, future site acquisitions, where no existing option agreement is in place or where expropriation may be needed, are costed on the basis of the research undertaken by the Board's appraiser, and more recent site acquisitions negotiations. The costs are based on valuation estimates of average acreage rates as of May 14, 2014.

### 6.4 Land Escalation over the Forecast Period

The Appraiser's Report also estimates an annual land escalation rate to be applied to the acreage values in order to sustain the likely site acquisition costs over the next 5 years. In arriving at an escalation factor of 5%

to be applied to the next 5-year horizon, the Appraisers considered the recent historical general economic conditions and land value trends over the past 10 years. The Appraisers concluded that:

**Annual Land Escalation Rate (5 year period)**

Review of market trends have been analyzed as part of your request in estimating the rate. The following represents sources of information relied upon.

- Inflation Rate:

March 2014	1.5%
Annual 2013	.9%
Annual 2012	1.5%
Annual 2011	2.9%
Annual 2010	1.8
  
- Consumer Price Index:

March 2014	124.8
Annual 2013	122.8
Annual 2012	121.7
Annual 2011	119.9
January 2010	116.5
  
- MLS Statistics – Average Sale Price Increases:

2013	7%
2012	7.6%
2011	7.1%
2010	6.7%

Review of “land resale’s” in recent years (pre June 2013):

8 Resales (annual increase indicated) 21.2% per year

6 Resales (annual increase indicated) 13.8% per

(Excludes sales outside the norm)

As of March 2014 to the best of my knowledge there have been no resale’s of residential land. Contact with six local land developers indicate a stagnant market for local development land. The consensus was a 0% -5% increase in land values over the past year, i.e. since March 2013. One exception was for Waterdown, where a major land owner and development company president is of the opinion that positive increases in Waterdown are as a result of the proximity to Burlington and its diminished land reserve.

As a result of the above and analysis on file the estimated Land Escalation Rate for a 5 year period is estimated at 5% per year.

Note: We are entering a period of changing trends for available developable land as a result of depletion, various government restrictions, environmental controls by Conservation Authorities, etc. **The above analysis is subject to information currently available.** It is recommended that a Summary Review of the report be made yearly.

## 6.5 Site Preparation/Development Costs

Site preparation/development costs are “costs to provide services to the land or otherwise prepare the site so that a building or buildings may be built on the land to provide pupil accommodation.”

Site preparation/development costs are funded through three different sources. First, there is an expectation that the owner of the designated school site will provide:

- site services to the edge of the property’s limit;
- rough grading and compaction; and
- a site cleared of debris.

This expectation is in consideration of being paid “fair market value” for the land. Where unserviced land is acquired by the board, the cost to “provide services to the land” is properly included in the education development charge.

Prior to 2009, a board who qualified for pupil accommodation grants received \$4.50 per square foot to provide a cost allowance for: landscaping, seeding and sodding (which includes rough grade and spreading stock-piled top soil), fencing and screening, asphalt and concrete (play areas, parking and curbs), as well as some excavation and backfilling. However, the current capital funding model requires that a school board submit a capital priorities business case for funding approval once such an initiative is announced by the Ministry. The Ministry’s “Leading Practices Manual for School Construction” states that, “Ministry funding for capital construction assumes soil conditions that would result in strip foundations or similar and other routine site costs, such as final grading, back-filling, landscaping, parking and curbs, hard and soft play areas, and on-site services.”

It is no longer clear if the Province is funding all the same site servicing costs as it did previously through pupil accommodation grants. The third and final source of financing site preparation/ development costs is education development charges (i.e. for ‘eligible’ school boards). Through discussion with the development community, the boards and the Ministry over time, a sample list (although by no means an exhaustive list) of EDC “eligible” site preparation/ development costs in a greenfields situation has been determined.

### **6.5.1 Eligible Site Preparation/Development Costs**

EDC eligible site preparation/development costs in a greenfields development area include:

- an agent or commission fee paid to acquire a site or to assist in negotiations to acquire a site;
- costs to fulfill municipal requirements to properly maintain the school site prior to construction of the school facility;
- land appraisal reports and legal fees;
- transportation studies related to site accessibility;
- soils tests;
- environmental studies related to the condition of the school site;
- preliminary site plan/fit studies;
- stormwater management studies related to the site;
- archaeological studies precedent to site plan approval of the site;
- planning studies aimed at ensuring municipal approval of the site plan;
- expropriation costs;
- site option agreement costs;
- rough grading, removal of dirt and rubble, engineered fill;
- removal of buildings on the site;
- land transfer taxes.

Finally, as noted above, in situations where a Board is acquiring raw land, or land on the fringe of the urban service boundary for the purposes of siting a school facility, eligible costs could additionally include:

- site servicing costs;
- temporary or permanent road access to the site;
- power, sanitary, storm and water services to the site;



- off-site services required by the municipality (e.g. sidewalks).

### 6.5.2 Conclusions on Site Preparation/Development Costs

The Board concluded that an average of \$68,410 per acre (based on the expenditure details set out below) for both elementary and secondary school sites is reasonable based on the documented experiences. It should be noted that both the HWDSB and the HWCDSB intend to adopt new EDC by-laws in August 2014. As such, all EDC-eligible expenditures incurred by both Boards have been reviewed by the Consultant. Given that the HWDSB's EDC-eligible expenditures do not, at this time, include those associated with site preparation and development costs, the average site preparation cost per acre is based on expenditures incurred by the HWCDSB.

Board	Site	Total Site Preparation Cost	# of Acres	Total Site Preparation Cost Per Acre
HWCDSB	Immaculate Conception	\$151,885	6.52	\$23,295
HWCDSB	St. Matthew (Former Binbrook #1 CES)	\$416,076	4.94	\$84,226
HWCDSB	Immaculate Heart of Mary	\$560,089	3.89	\$143,982
HWCDSB	Bishop Ryan CSS (Former Heritage Green CSS/Highland Road/Mount Albion Sec)	\$398,465	18	\$22,137
<b>Average Costs -- 2014 Study</b>				<b>\$68,410</b>

The 2009-2013 average annual change in the Statistics Canada Non-Residential Price Index for Institutional Structures (Toronto Series) is 1.96%. While this average price index change is nominal, given the Board's anticipated site preparation costs over the 15-year period, it is reasonable to apply an escalator of 2% per annum. Site preparation/development costs are escalated annually over the fifteen-year forecast period up to the year in which those costs will be incurred.

The Form E,F, and Gs of the EDC Submission, set out in Chapter 7 outline the assumed cost per acre (expressed in 2014 dollars), the assumed total land costs escalated to the year of site acquisition, or the end of the proposed by-law period, whichever is sooner, the site development costs and associated financing costs for each site required to meet the needs of the net growth-related pupil places.

## Chapter 7: EDC CALCULATION

The basis for the calculation of the jurisdiction-wide schedule of education development charges for the Hamilton-Wentworth District School Board is documented in the Board's Education Development Charges Submission to the Ministry of Education and found in this Chapter.

### 7.1 Growth Forecast Assumptions

The net education land costs and EDC calculations for the HWDSB were based on the following forecast of net new dwelling units for the mid-2014 to mid-2029 period, as detailed in Chapter 4 of this report:

#### RESIDENTIAL:

Net New Units 50,292

Average units per annum 3,353

The forecast of non-residential (includes commercial, industrial and institutional development) building permit value over the mid-2014 to mid-2029 period, as detailed in Chapter 4 of this report, is summarized as follows:

#### NON-RESIDENTIAL:

Net Gross Floor Area (GFA) 23,432,152 sq.ft.

Average annual GFA 1,532,143 sq.ft.

### 7.2 EDC Pupil Yields

In addition, the Board's education development charge calculations were based on assumptions respecting the number of pupils generated, per dwelling unit type (with separate pupil yields applied to each type), by municipality, and by panel (elementary versus secondary) from new development, as set out in Forms E, F and G included in this Chapter and described in detail in Chapter 5 of this report.

Table 7-1 sets out the EDC pupil yields utilized to determine the number of pupils generated from new development and the yields attributable to the HWDSB based on historical apportionment shares.



**TABLE 7-1: HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD  
PUPIL YIELDS BY ELEMENTARY & SECONDARY REVIEW AREA**

Summary of Weighted/Blended Pupil Yields -- Elementary				
Review Area	SINGLES	MEDIUM DENSITY	APARTMENTS	Total
E01A - Queens Rangers	0.2768	-	-	0.2768
E01B - Ancaster	0.2588	0.1279	0.0390	0.1673
E01C - West Glanbrook	0.2654	0.1829	0.0390	0.1547
E01D - West Hamilton Mountain	0.1715	0.0816	0.0390	0.0763
E02A - East Waterdown	0.3420	0.1349	0.0390	0.1824
E02B - West Waterdown	0.3420	0.1310	0.0390	0.2137
E02C - East Flamborough	0.3420	-	-	0.3420
E02D - Dundas and West Flamborough	0.3420	0.1250	0.0390	0.1692
E03A - East Glanbrook	0.2850	0.1449	0.0390	0.2143
E03B - East Glanbrook and Upper Stoney Creek	0.2804	0.1751	0.0390	0.1991
E04A - West Hamilton City - Westdale	0.2000	0.0736	0.0130	0.0283
E04B - Central Hamilton City	-	-	0.0130	0.0130
E05A - Central Mountain	0.1884	0.0799	0.0390	0.1310
E05B - East Mountain	0.3310	0.0899	0.0390	0.3001
E06A - East Hamilton Mountain	0.1888	0.0935	-	0.1551
E06B - East Hamilton - Lower Stoney Creek	0.3098	0.1153	0.0200	0.0978
E06C - Winona	0.2980	0.1266	0.0390	0.1831
<b>Total</b>	<b>0.2924</b>	<b>0.1381</b>	<b>0.0252</b>	<b>0.1550</b>

Summary of Weighted/Blended Pupil Yields -- Secondary				
Review Area	SINGLES	MEDIUM DENSITY	APARTMENTS	Total
S01 - Ancaster - West Hamilton Mountain	0.0983	0.0576	0.0208	0.0548
S02 - Dundas - Flamborough	0.1032	0.0523	0.0208	0.0644
S03 - East Glanbrook - Upper Stoney Creek	0.0983	0.0586	0.0208	0.0726
S04 - Central and West Hamilton City	0.0860	0.0316	0.0068	0.0129
S05 - East Mountain	0.1012	0.0289	0.0208	0.0868
S06 - East Hamilton - Stoney Creek	0.0720	0.0324	0.0133	0.0412
<b>Total</b>	<b>0.0953</b>	<b>0.0486</b>	<b>0.0133</b>	<b>0.0534</b>

### 7.3 Determination of Net Growth-Related Pupil Place Requirement

The determination of the number of growth-related pupil places eligible for EDC funding involves three key steps. The analysis required to complete each of these steps was undertaken for each of the growth forecast sub-areas, or review areas, discussed in Chapter 3. Generally, the steps required to determine the number of net growth-related pupil places by review area, are as follows:

1. Determine the requirements of the existing community which is total permanent capacity (net of any leased or non-operational capacity) of all school facilities in each Board's inventory measured against the projected enrolment (i.e. headcount enrolment for the elementary panel and ADE enrolment for the secondary panel) from the existing community at the end of the fifteen-year forecast period. Distinguish between schools and associated existing community enrolment that is, and isn't, available and accessible to accommodate new development.
2. Determine the requirements of new development, which is the number of pupils generated from the dwelling units forecasted to be constructed over the forecast period.
3. Determine Net Growth-related Pupil Place Requirements which is the requirements of new development less the number of available pupil places in existing facilities that are available and accessible to new housing development.

It is noted that the Board may apportion the OTG capacity for recently approved projects between the requirements of the existing community and the requirements of new development, provided that the needs of the existing community are first met. The Board is also entitled to remove any OTG capacity that is not considered to be available to serve new development (e.g., leased space, closed non-operational space, temporary holding space, etc.) or accessible (that is, the capacity is within reasonable proximity to the proposed development).

Table 7-2 sets out the projected net growth-related pupil place requirements (assuming a jurisdiction-wide approach to the calculation), including the determination of the requirements of the new development and the requirements of the existing community, by panel for the HWDSB.

**TABLE 7-2**

Hamilton-Wentworth District School Board Determination of Net Growth-Related Pupil Places				
	Elementary		Secondary	
	Review Area Schools Where There is Little or No Housing Growth:	Review Area Schools Impacted by Housing Growth:	Review Area Schools Where There is Little or No Housing Growth:	Review Area Schools Impacted by Housing Growth:
<b>OTG Capacity</b>	36,249	3,237	15,099	954
<b>Projected 2028/29 Enrolment (Existing Community)</b>	28,061	3,747	12,176	1,169
<b>Requirements of New Development 2028/29 (Headcount Elementary)</b>		7,796		2,684
<b>Less: Available and Accessible Pupil Places on a Review Area Basis</b>		341		0
<b># of NGRPP Included in EDC Rate</b>		5,128		1,115

## 7.4 Approved Capital Cost Per Pupil

Paragraphs 4 to 10 of Section 7 of O. Reg. 20/98 set out the steps involved in moving from growth-related new school pupils to obtain “the growth-related net education land costs.” Generally, these steps are as follows:

1. Estimate the net education land cost for the elementary and secondary school sites required to provide new pupil places.
2. Estimate the balance of the existing EDC account, on the day prior to inception of the new EDC by-law, if any. If the balance is positive, subtract the balance from the net education land costs. If the balance is negative, add the balance (in a positive form) to the net education land costs.
3. Determine the portion of the charges related to residential development and to non-residential development if the Board intends to impose a non-residential charge.
4. Differentiate the residential development charge by unit type if the Board intends to impose a variable residential rate. Instructions setting out the methodological approach to differentiate the residential charge can be found in the Education Development Charge Guidelines (Spring 2002) prepared by the Ministry of Education.

## 7.5 Net Education Land Costs and Forms E, F and G

The total net education land costs for the HWDSB, including escalation of land over the term of the by-law (five years), site acquisition costs, site development costs, associated financing costs, study costs and outstanding financial obligations are \$60,172,899 to be recovered from 50,292 “net” new residential units and 23,432,152 square feet of “net” non-residential gross floor area.

The Board does not anticipate being in a position to designate 2014-15 operating budget funds for the purpose of acquiring school sites. Further, the Board has had no opportunities to implement alternative accommodation arrangements that may offset future EDCs. On April 28, 2014, the HWDSB Trustees approved the following resolution:

**A. Education Development Charge Policies on Application of Operating Surpluses and Alternative Accommodation Arrangements**

**That the Board approve the following statements to satisfy the requirements of our two Education Development Charge related policies.**

- (i.) That there is not an operating surplus available in the non-classroom portion of the budget that can be applied to reduce growth related net education land costs; and,**
- (ii.) That there have been no opportunities to implement alternative accommodation arrangements.**

A copy of the Board’s policies is found in Appendix C of this document.

### EDC Submission (Forms E, F and G)

The following sheets detail for each elementary and secondary panel:

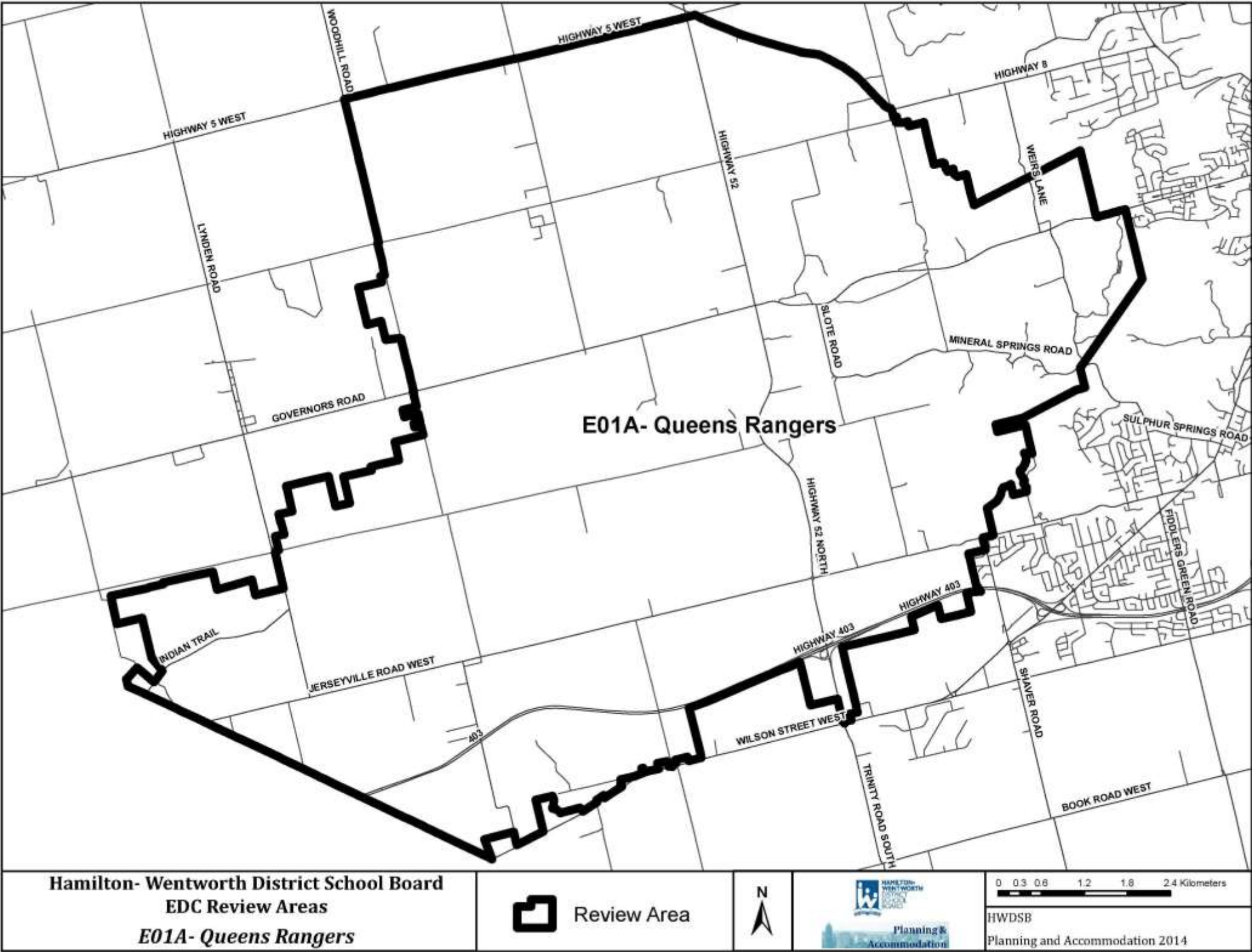
- the cumulative number of forecasted new dwelling units by type;  
the weighted/blended pupil yield by unit type and the number of growth-related pupil places generated by the 15-year housing forecast;
- the existing schools within each review area, the OTG capacity for EDC purposes, distinguished between schools that are, and are not impacted by new development (i.e. historical development where a board has been unable to secure a growth-related school site as yet, and future development where additional growth-related school sites are in the process of being secured or have been identified by the board as a future need);
- the projected existing community enrolment;

- the cumulative requirements of new development and the determination of the number of available and surplus pupil places;
- the number of net growth-related pupil places and the number of eligible pupil places;
- comments detailing the Board's capital priorities, and the determination of the number of historical net growth-related pupil places (NGRPP);
- a description of the growth-related site acquisition needs, the number of eligible acres, the anticipated cost per acre, the site preparation costs, financing costs and total education land costs.





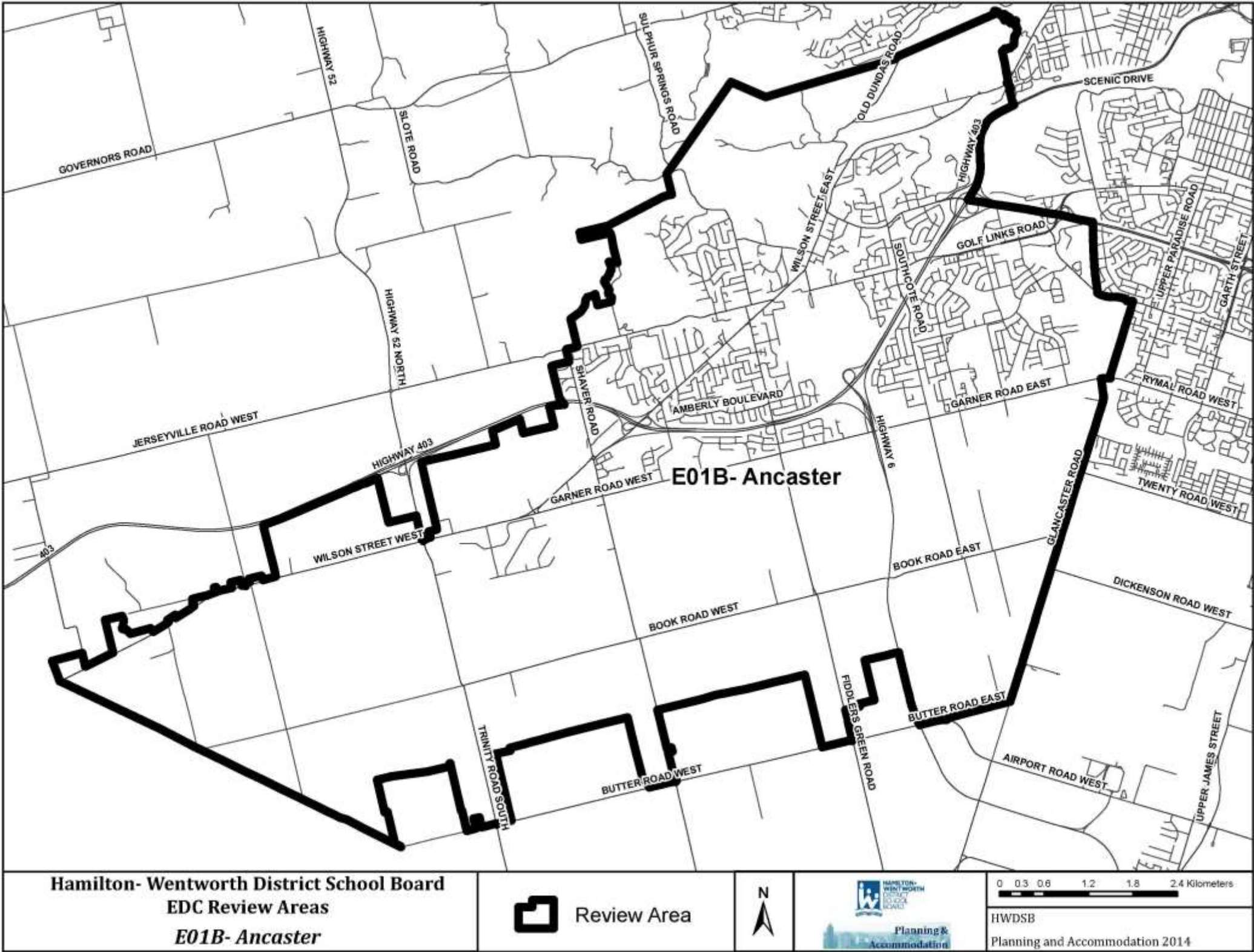
*Elementary Review Areas*





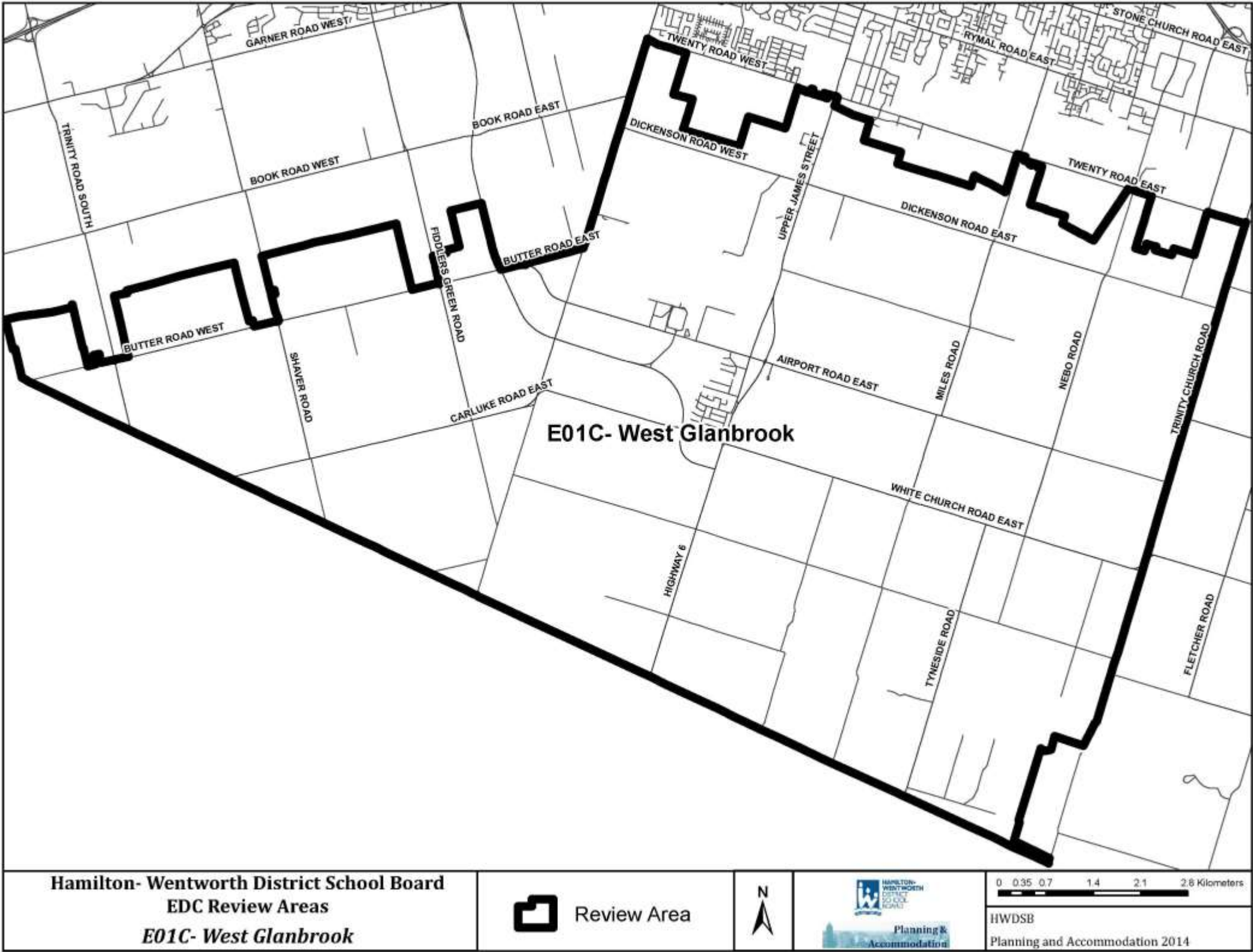
Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

<b>Review Area: E01A - Queens Rangers</b>					Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils	
<b>Projected Housing Growth</b>																							
Singles					0	4	0	0	4	0	4	0	0	4	0	0	4	0	0	0.2768	20	6	
Medium Density					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0000	-	-	
Apartments					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0000	-	-	
<b>A Total Gross Dwelling Units</b>					0	4	0	0	4	0	4	0	0	4	0	0	4	0	0	0.2768	20	6	
<b>Requirements of Existing Community:</b>																							
<b>B Review Area Schools</b>			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities	
B1 Queens Rangers			190	127	125	123	119	117	111	114	112	111	111	113	114	115	116	117	117			1	
B2																							
B3																							
B4																							
B5																							
B7																							
B8																							
B9																							
B10																							
B11																							
B12																							
B13																							
B14																							
B15																							
B16																							
B17																							
<b>Totals</b>			190	127	125	123	119	117	111	114	112	111	111	113	114	115	116	117	117			1	
<b>Total Available Pupil Spaces to Accommodate Growth</b>				63	65	67	71	73	79	76	78	79	79	77	76	75	74	73	73				
<b>C Review Area Schools Impacted by Housing Growth:</b>			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities	
C1																							
C2																							
C3																							
C4																							
C5																							
C6																							
C7																							
C8																							
<b>Totals</b>			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0	
<b>Total Available Pupil Spaces to Accommodate Growth</b>				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
<b>D Requirements of New Development for High Growth Areas (Cumulative):</b>					0	1	1	1	2	2	3	3	3	4	4	4	5	5	6				
<b>E Less: Available Pupil Places to Accommodate Growth</b>																			0				
<b>F Equals: Net growth-related Pupil Place Requirements</b>																			6				
<b>Description of Growth-related Need:</b>																							
<b>Growth-related Net Education Lands Costs</b>			Site	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs						
Description of Growth-related Site Acquisition Needs:			Status																				
1 To be accommodated in the existing school					6																		
2																							
3																							



Review Area: E01B - Ancaster							Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																								
	Singles						269	191	150	160	67	90	14	0	0	0	0	0	0	0	0	0.2588	941	243
	Medium Density						138	185	214	168	55	67	21	21	0	0	0	0	0	0	0	0.1279	890	114
	Apartments						24	0	29	62	62	127	63	15	15	0	0	0	0	0	0	0.0390	397	15
A	Total Gross Dwelling Units						431	376	393	390	184	284	98	36	36	0	0	0	0	0	0	0.1673	2,228	373
Requirements of Existing Community:																								
B	Review Area Schools			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities	
B1																								
B2																								
B3																								
B4																								
B5																								
B6																								
B7																								
B8																								
B9																								
B10																								
B11																								
B12																								
B13																								
B14																								
B15																								
B16																								
B17																								
Totals				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0
Total Available Pupil Spaces to Accommodate Growth						0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
C	Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities	
C1	Ancaster Meadow			578	844	837	853	838	830	802	796	774	738	733	728	728	729	730	734	737			9	
C2	Ancaster Senior			387	311	300	302	343	340	322	333	288	271	290										

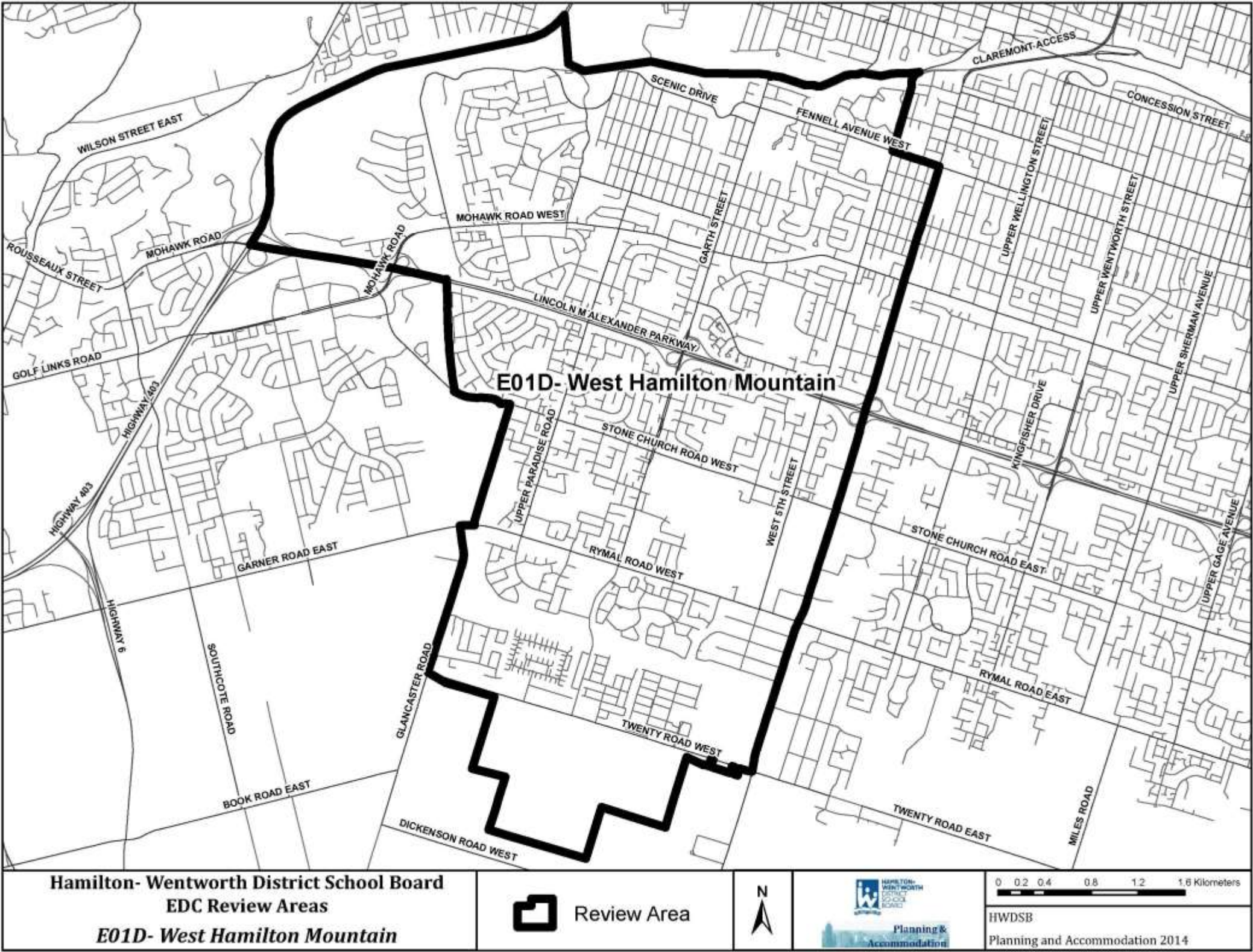




Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

Review Area: E01C - West Glanbrook					Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																						
Singles					0	0	23	23	33	23	23	23	24	0	0	0	0	0	0	0.2654	172	46
Medium Density					0	21	60	74	39	45	39	42	0	0	0	0	0	0	0	0.1829	359	66
Apartments					0	0	46	34	34	34	34	34	36	0	0	0	0	0	0	0.0390	252	10
A Total Gross Dwelling Units					0	21	129	131	106	102	96	96	102	0	0	0	0	0	0	0.1547	783	121
Requirements of Existing Community:																						
B	Review Area Schools	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities	
B1	Bell-Stone	181	55	48	44	43	42	40	41	40	40	40	40	40	40	40	40	40			0	
B2	Mount Hope	348	311	324	333	336	334	343	340	351	352	355	348	345	348	350	352	353			0	
B3																						
B4																						
B5																						
B6																						
B7																						
B8																						
B9																						
B10																						
B11																						
B12																						
B13																						
B14																						
B15																						
B16																						
B17																						
Totals		529	366	372	377	379	376	383	381	391	392	395	388	385	388	390	392	393			0	
Total Available Pupil Spaces to Accommodate Growth			163	157	152	150	153	146	148	138	137	135	141	144	141	139	137	136				
C	Review Area Schools Impacted by Housing Growth:	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities	
C1																						
C2																						
C3																						
C4																						
C5																						
C6																						
C7																						
C8																						
Totals		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
Total Available Pupil Spaces to Accommodate Growth			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0	
Requirements of New Development for High Growth Areas (Cumulative):				0	3	21	41	58	73	88	105	124	125	127	129	127	125	121				
E	Less: Available Pupil Places to Accommodate Growth																				0	
F	Equals: Net growth-related Pupil Place Requirements																				121	
Description of Growth-related Need:																						
Growth-related Net Education Lands Costs		Site	Proposed Year of Acquisition	NGRPP	Proposed School Capacity	% of Capacity Attributable to NGRPP	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs						
Description of Growth-related Site Acquisition Needs:		Status																				
1	To be accommodated in existing schools			121																		
2																						
3																						
4																						
5																						

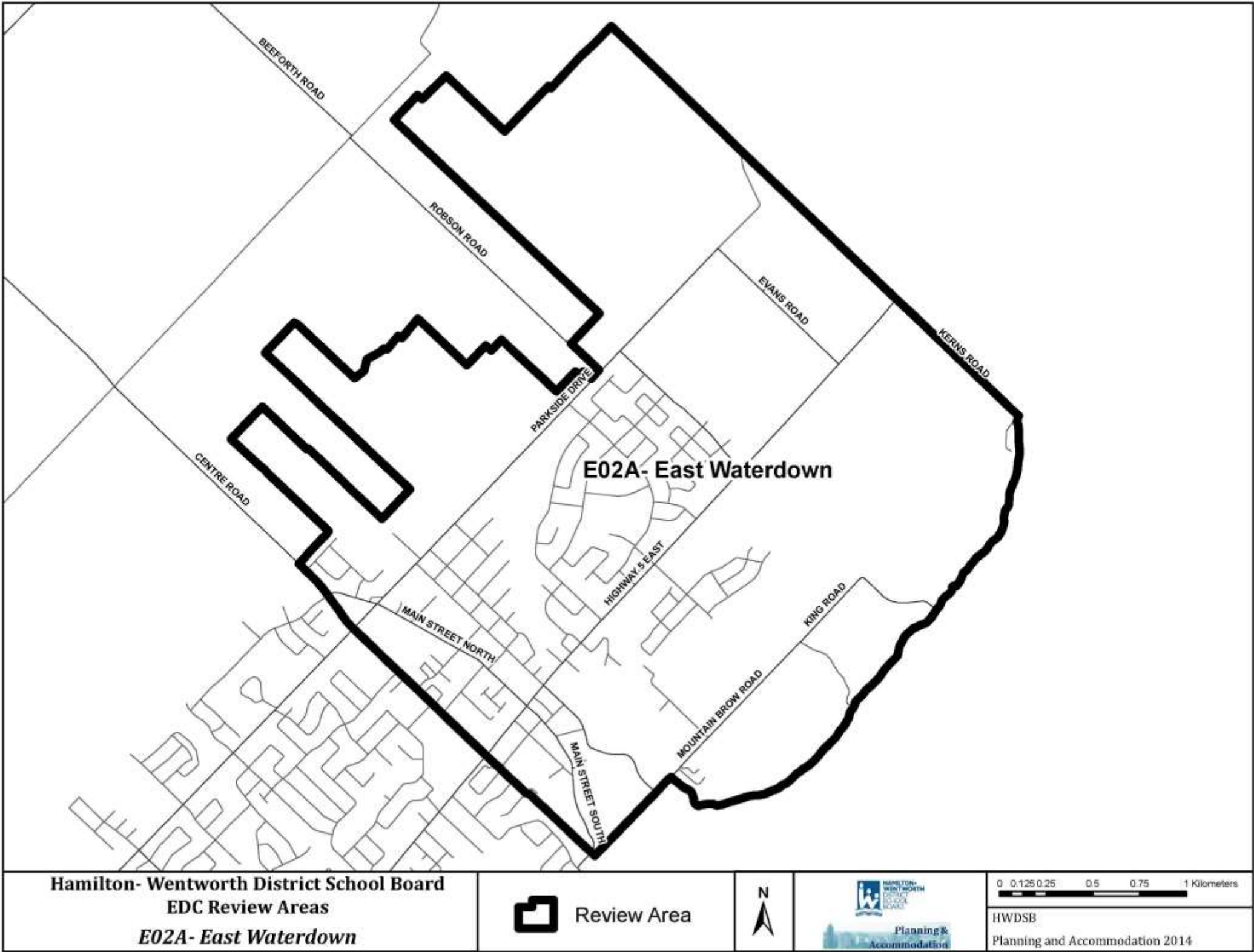




Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

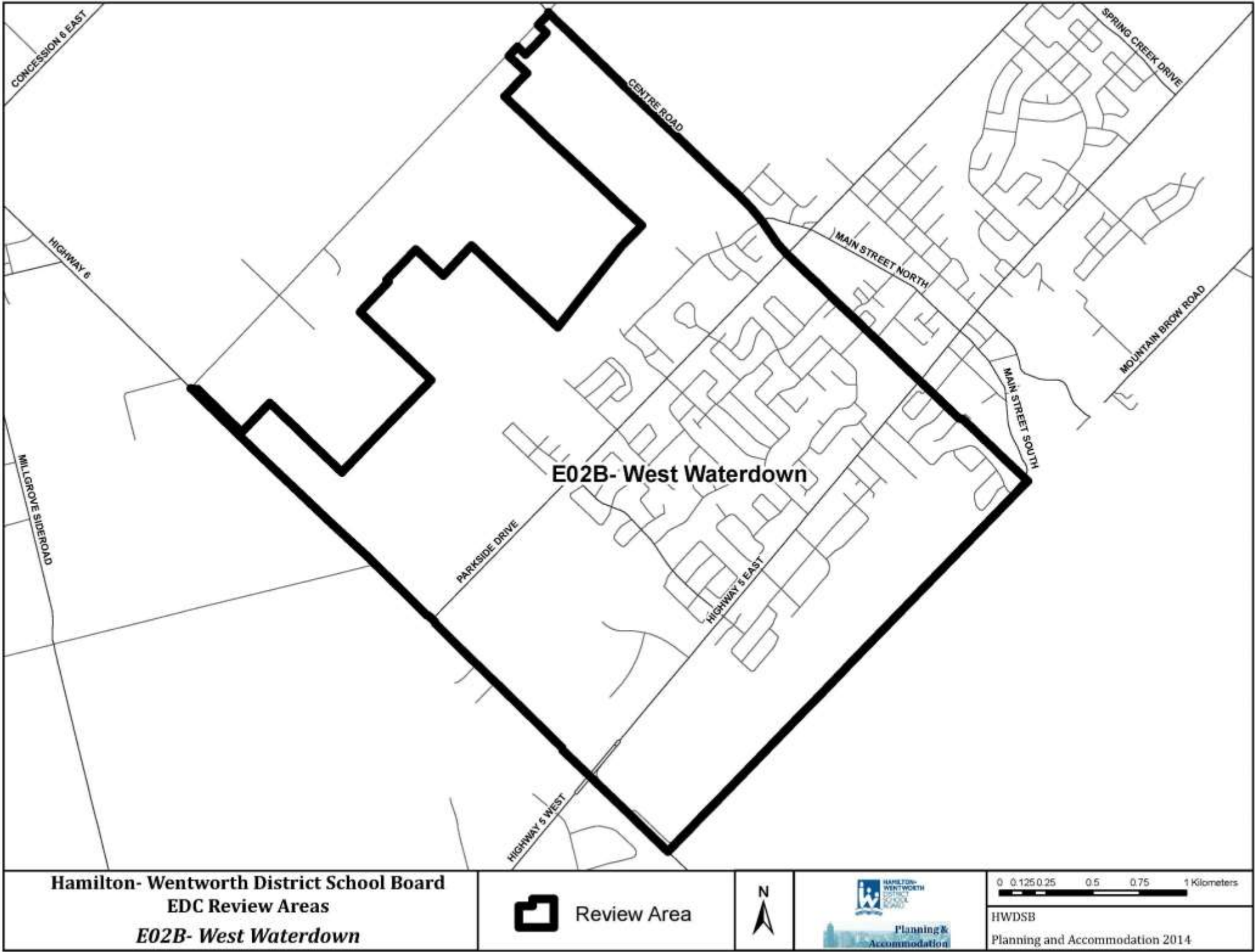
<b>Review Area: E01D - West Hamilton Mountain</b>			Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils	
<b>Projected Housing Growth</b>																					
Singles			106	105	101	88	61	18	19	0	0	0	0	0	0	85	85	0.1715	668	115	
Medium Density			43	64	118	124	114	10	10	5	0	0	58	58	58	58	58	0.0816	778	63	
Apartments			0	11	0	110	260	301	236	129	110	110	110	110	110	110	110	0.0390	1,817	71	
<b>A Total Gross Dwelling Units</b>			149	180	219	322	435	329	265	134	110	110	168	168	168	253	253	0.0763	3,263	249	
<b>Requirements of Existing Community:</b>																					
<b>B Review Area Schools</b>			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities
B1 Buchanan Park			233	174	180	173	163	156	156	155	150	146	143	140	141	142	143	144	145		1
B2 Chedoke			584	516	508	505	495	483	486	493	500	493	478	473	474	477	481	485	489		2
B3 Gordon Price			435	431	415	407	402	389	392	385	382	384	382	383	382	382	383	385	387		2
B4 Holbrook			302	212	212	204	201	198	200	199	196	197	198	200	202	204	206	208	209		0
B5 James Macdonald			325	278	281	274	272	280	278	275	272	259	260	261	263	265	267	268	268		0
B6 Mountview			256	197	192	182	176	171	166	160	159	159	161	164	166	168	170	171	172		0
B7 R.A. Riddell			521	768	744	731	710	681	659	646	635	626	616	604	606	608	611	614	616		7
B8 Westview			308	269	242	218	236	228	221	205	212	215	222	204	201	198	199	200	202		0
B9 Westwood			383	221	230	222	211	209	199	209	207	207	208	210	211	213	214	215	215		0
B10																					
B11																					
B12																					
B13																					
B14																					
B15																					
B16																					
B17																					
<b>Totals</b>			3,347	3,066	3,004	2,915	2,867	2,794	2,757	2,726	2,713	2,685	2,667	2,637	2,645	2,658	2,673	2,689	2,704		12
<b>Total Available Pupil Spaces to Accommodate Growth</b>				281	343	432	481	553	591	621	634	662	680	710	702	690	674	658	643		
<b>C Review Area Schools Impacted by Housing Growth:</b>			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29		Number of Temp. Facilities
C1																					
C2																					
C3																					
C4																					
C5																					
C6																					
C7																					
C8																					
<b>Totals</b>			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		0
<b>Total Available Pupil Spaces to Accommodate Growth</b>					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
<b>D Requirements of New Development for High Growth Areas (Cumulative):</b>					24	49	77	106	135	151	164	171	177	183	189	195	201	225	249		
<b>E Less: Available Pupil Places to Accommodate Growth</b>																					0
<b>F Equals: Net growth-related Pupil Place Requirements</b>																					249
<b>Description of Growth-related Need:</b>																					
<b>Growth-related Net Education Lands Costs</b>			Site	Proposed Year of Acquisition	NGRPP	Proposed School Capacity	% of Capacity Attributable to NGRPP	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs				
<b>Description of Growth-related Site Acquisition Needs:</b>			Status	Acquisition	Requirements	Capacity	Requirements	Required	Acres	Acre	Costs	Costs	Costs	Costs	Costs	Costs	Costs	Costs			
1 To be accommodated in existing facilities					249																
2																					
3																					
4																					
5																					





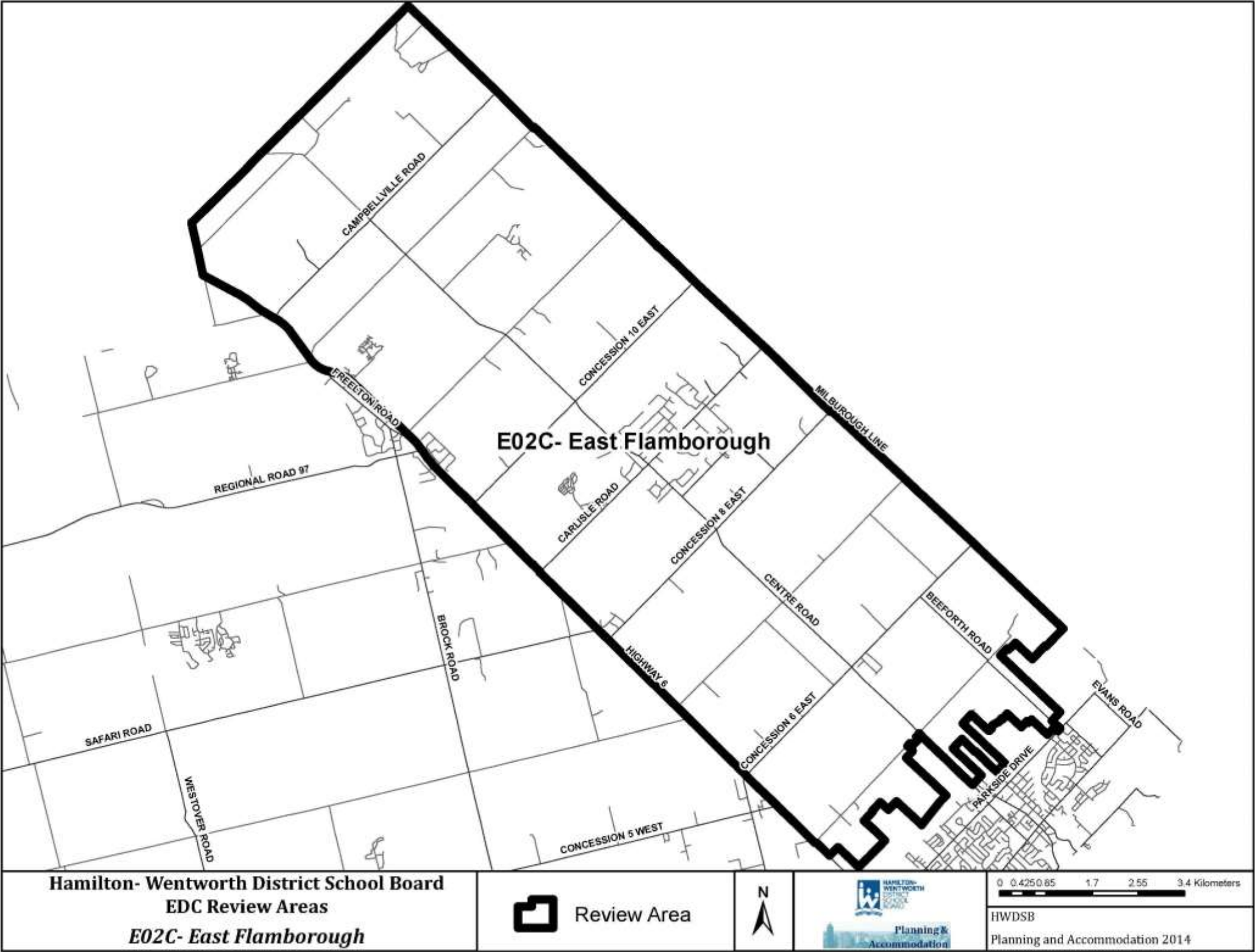


Review Area: E02A - East Waterdown						Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																							
Singles						151	136	136	136	136	67	67	89	89	89	164	164	231	231	231	0.3420	2,117	724
Medium Density						40	40	40	40	40	66	66	66	66	71	0	0	0	44	55	0.1349	634	86
Apartments						0	0	0	0	0	93	93	267	267	271	267	267	273	174	174	0.0390	2,146	84
A Total Gross Dwelling Units						191	176	176	176	176	226	226	422	422	431	431	431	504	449	460	0.1824	4,897	893
Requirements of Existing Community:																							
B Review Area Schools				OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities
B1 Mary Hopkins				385	313	290	285	278	280	287	281	286	289	293	297	300	304	306	307	309			6
B2																							
B3																							
B4																							
B5																							
B6																							
B7																							
B8																							
B9																							
B10																							
B11																							
B12																							
B13																							
B14																							
B15																							
B16																							
B17																							
Totals				385	313	290	285	278	280	287	281	286	289	293	297	300	304	306	307	309			6
Total Available Pupil Spaces to Accommodate Growth						72	95	100	107	105	98	104	99	96	92	88	85	81	79	78	76		
C Review Area Schools Impacted by Housing Growth:				OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities
C1																							
C2																							
C3																							



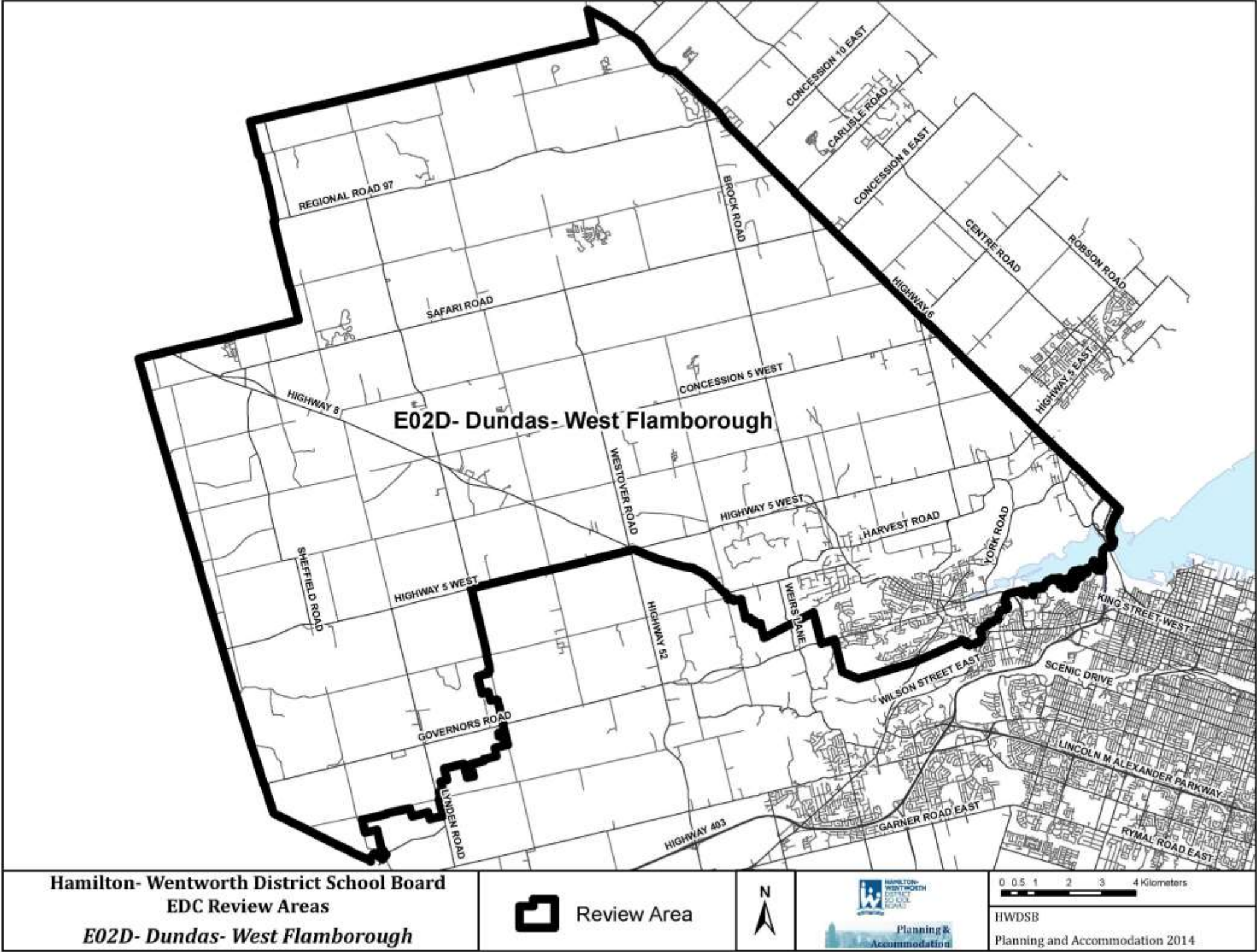
Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

<b>Review Area: E02B - West Waterdown</b>					Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
<b>Projected Housing Growth</b>																						
Singles					87	87	87	87	87	87	57	32	32	32	132	132	126	127	109	0.3420	1,301	445
Medium Density					40	40	40	40	85	90	90	105	115	115	115	115	115	115	0.1310	1,335	175	
Apartments					29	29	0	42	0	34	60	65	65	0	0	0	0	0	0.0390	324	13	
<b>A Total Gross Dwelling Units</b>					156	156	127	169	172	211	207	202	212	147	247	247	241	242	224	0.2137	2,960	632
<b>Requirements of Existing Community:</b>																						
<b>B Review Area Schools</b>			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities
B1 Allan A. Greenleaf			547	459	427	406	401	396	398	403	411	412	411	413	414	417	420	424	426			4
B2 Guy B. Brown			638	621	636	652	655	648	641	651	630	617	609	605	607	610	612	615	618			0
B3																						
B4																						
B5																						
B6																						
B7																						
B8																						
B9																						
B10																						
B11																						
B12																						
B13																						
B14																						
B15																						
B16																						
B17																						
<b>Totals</b>			1,185	1,080	1,063	1,058	1,056	1,044	1,038	1,054	1,042	1,029	1,020	1,018	1,022	1,026	1,033	1,039	1,045		4	
<b>Total Available Pupil Spaces to Accommodate Growth</b>				105	123	127	129	141	147	131	144	156	165	167	164	159	152	146	141			
<b>C Review Area Schools Impacted by Housing Growth:</b>			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities
C1																						
C2																						
C3																						
C4																						
C5																						
C6																						
C7																						
C8																						
<b>Totals</b>			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		0	
<b>Total Available Pupil Spaces to Accommodate Growth</b>				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
<b>D Requirements of New Development for High Growth Areas (Cumulative):</b>					36	72	106	142	182	225	259	286	314	341	402	462	521	580	633			
<b>E Less: Available Pupil Places to Accommodate Growth</b>																					-141	
<b>F Equals: Net growth-related Pupil Place Requirements</b>																					492	
<b>Description of Growth-related Need:</b>																						
<b>Growth-related Net Education Lands Costs</b>																						
<b>Description of Growth-related Site Acquisition Needs</b>			Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs					
1 West Waterdown			TBD	2027	492	589	83.5%	6.00	5.01	\$800,000	\$4,009,508	\$342,863	\$1,107,753	\$0		\$3,310	\$5,463,434					
2																						
3																						
4																						
5																						





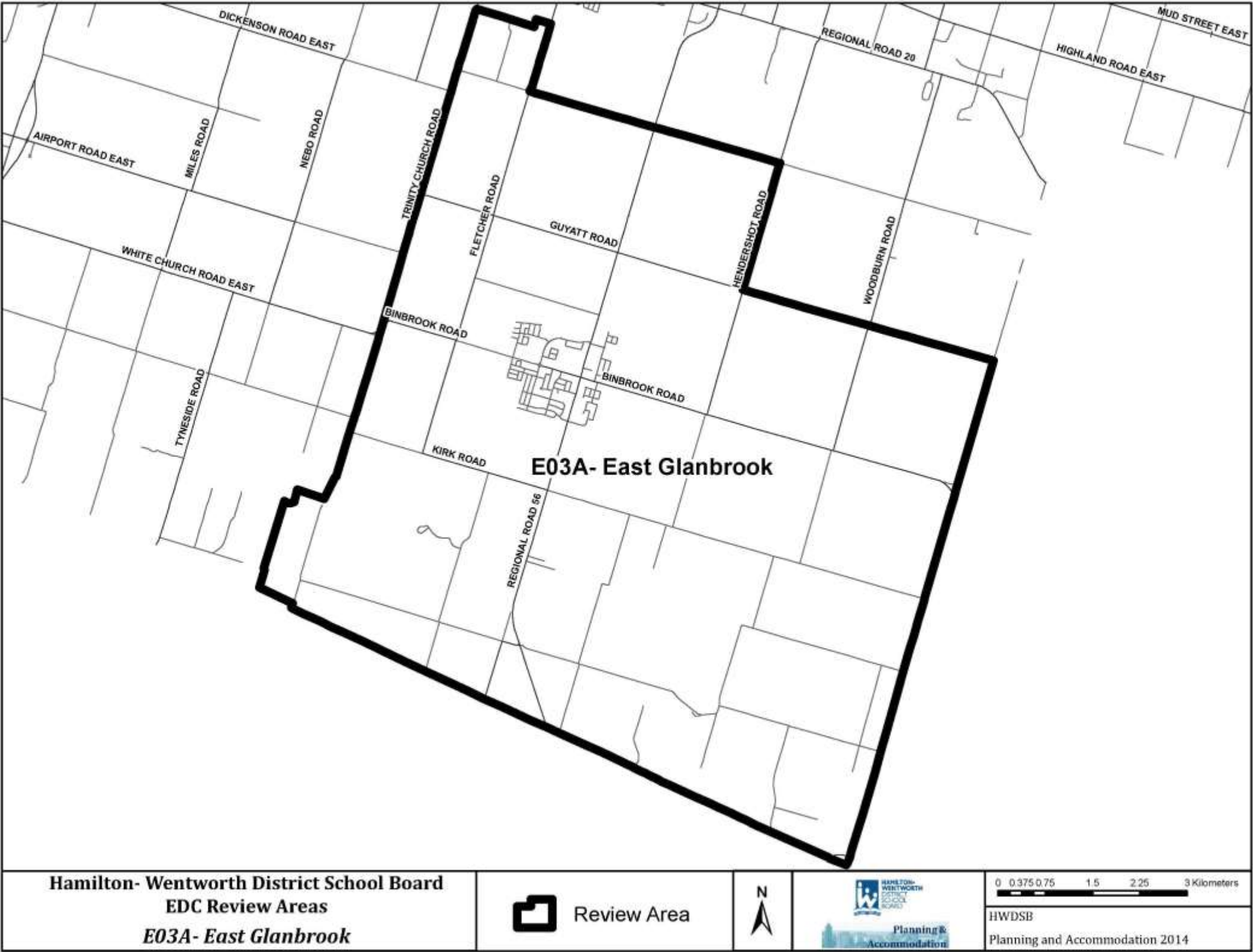
Review Area: E02C - East Flamborough					Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																						
	Singles			3	3	8	8	5	5	5	5	5	5	5	5	5	5	9	8	0.3420	84	29
	Medium Density			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0000	-	-
	Apartments			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0000	-	-
A	Total Gross Dwelling Units			3	3	8	8	5	5	5	5	5	5	5	5	5	5	9	8	0.3420	84	29
<b>Requirements of Existing Community:</b>																						
B	Review Area Schools	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities	
B1	Balaclava	392	369	347	344	350	342	335	337	331	316	314	315	319	322	326	329	332			6	
B2	Flamborough Centre	260	297	284	258	252	223	203	208	207	214	199	200	203	206	210	214	217			8	
B3																						
B4																						
B5																						
B6																						
B7																						
B8																						
B9																						
B10																						
B11																						
B12																						
B13																						
B14																						
B15																						
B16																						
B17																						
	Totals	652	666	631	602	602	565	538	545	538	530	513	516	522	528	536	543	549			14	
	Total Available Pupil Spaces to Accommodate Growth		0	21	50	50	87	114	107	114	122	139	136	130	124	116	109	103				
C	Review Area Schools Impacted by Housing Growth:	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities	
C1																						
C2																						
C3																						
C4																						



Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014


<b>Review Area: E02D - Dundas and West Flamborough</b>			Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils	
<b>Projected Housing Growth</b>																					
Singles			12	32	12	17	24	18	12	12	12	12	12	12	12	12	12	0.3420	223	76	
Medium Density			0	18	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1250	18	2	
Apartments			0	85	0	61	14	87	43	0	0	0	0	0	0	0	0	0.0390	290	11	
<b>A Total Gross Dwelling Units</b>			12	135	12	78	38	105	55	12	12	12	12	12	12	12	12	0.1692	531	90	
<b>Requirements of Existing Community:</b>																					
<b>B</b>	<b>Review Area Schools</b>	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities	
B1	Beverly Central	230	172	158	147	137	134	121	124	124	124	125	126	127	129	130	131	132		0	
B2	Dr. John Seaton	337	228	236	233	234	220	217	209	209	202	210	208	208	209	211	213	215		0	
B3	Dundana	383	336	315	309	303	278	268	265	264	264	265	266	268	269	271	273	276		1	
B4	Dundas Central	447	423	398	387	384	363	337	333	330	330	329	327	329	330	333	336	338		1	
B5	Greensville	222	205	192	193	186	186	185	181	180	182	184	186	188	189	190	191	191		1	
B6	Millgrove	227	172	169	159	160	155	156	147	148	147	147	147	147	147	146	145	144		1	
B7	Sir William Osler	644	598	608	600	586	566	561	542	519	511	505	495	496	499	502	506	509		1	
B8	Spencer Valley	239	186	193	180	176	166	158	168	164	165	150	147	147	148	150	151	153		0	
B9	Yorkview	213	186	184	181	181	179	178	179	174	174	174	175	176	178	180	181	182		4	
B10																					
B11																					
B12																					
B13																					
B14																					
B15																					
B16																					
B17																					
<b>Totals</b>		2,942	2,506	2,453	2,389	2,346	2,246	2,181	2,147	2,110	2,098	2,088	2,078	2,085	2,097	2,112	2,126	2,139		9	
<b>Total Available Pupil Spaces to Accommodate Growth</b>			436	489	553	596	696	761	795	832	844	854	864	857	846	830	816	803			
<b>C</b>	<b>Review Area Schools Impacted by Housing Growth:</b>	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities	
C1																					
C2																					
C3																					
C4																					
C5																					
C6																					
C7																					
C8																					
<b>Totals</b>		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		0	
<b>Total Available Pupil Spaces to Accommodate Growth</b>			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
<b>D</b>	<b>Requirements of New Development for High Growth Areas (Cumulative):</b>			4	21	25	33	42	51	57	62	66	70	74	78	82	86	90			
<b>E</b>	Less: Available Pupil Places to Accommodate Growth																	0			
<b>F</b>	Equals: Net growth-related Pupil Place Requirements																	90			
<b>Description of Growth-related Need:</b>																					
<b>Growth-related Net Education Lands Costs</b>		Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs					
1	To be accommodated in existing facilities			90																	
2																					
3																					
4																					
5																					

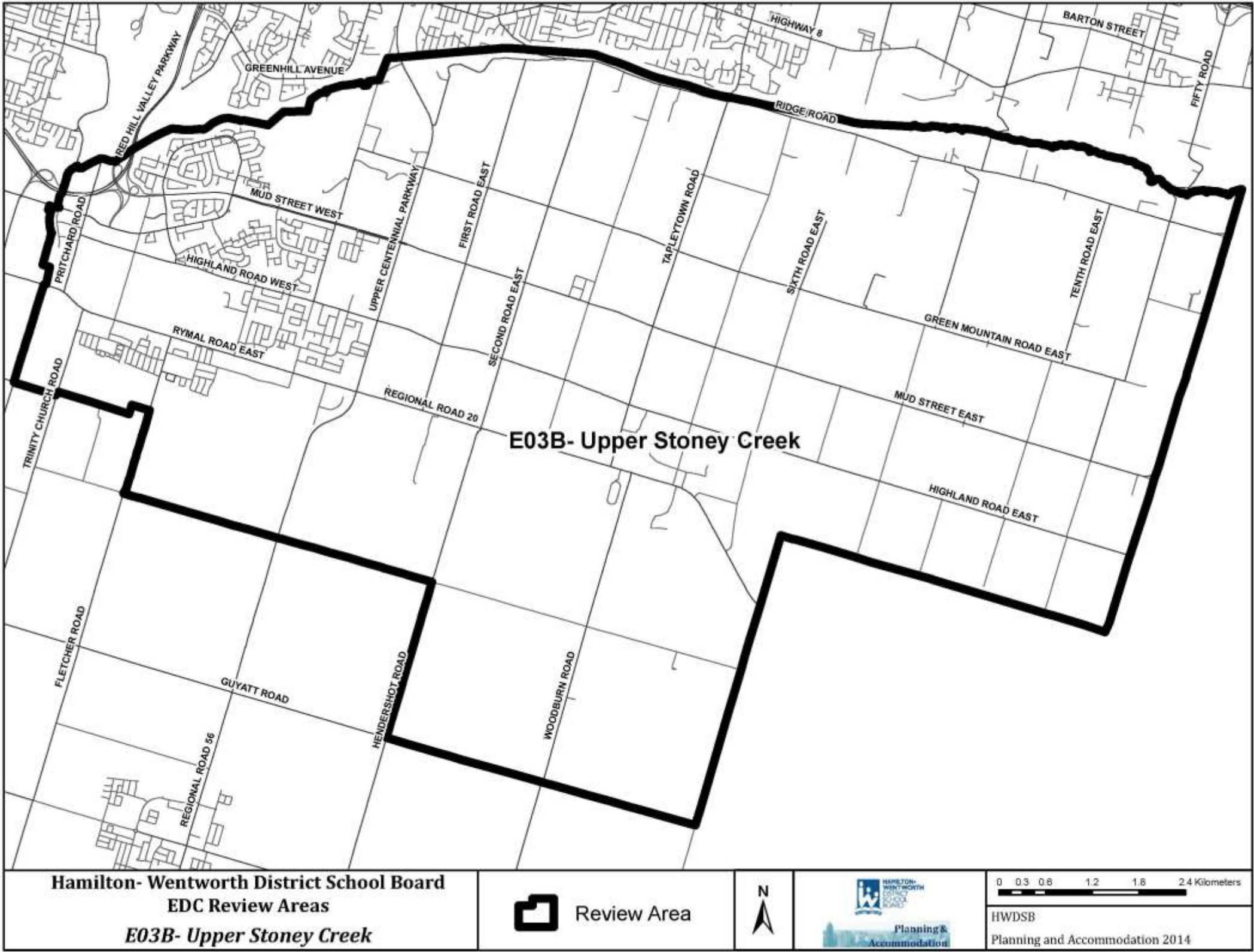






Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

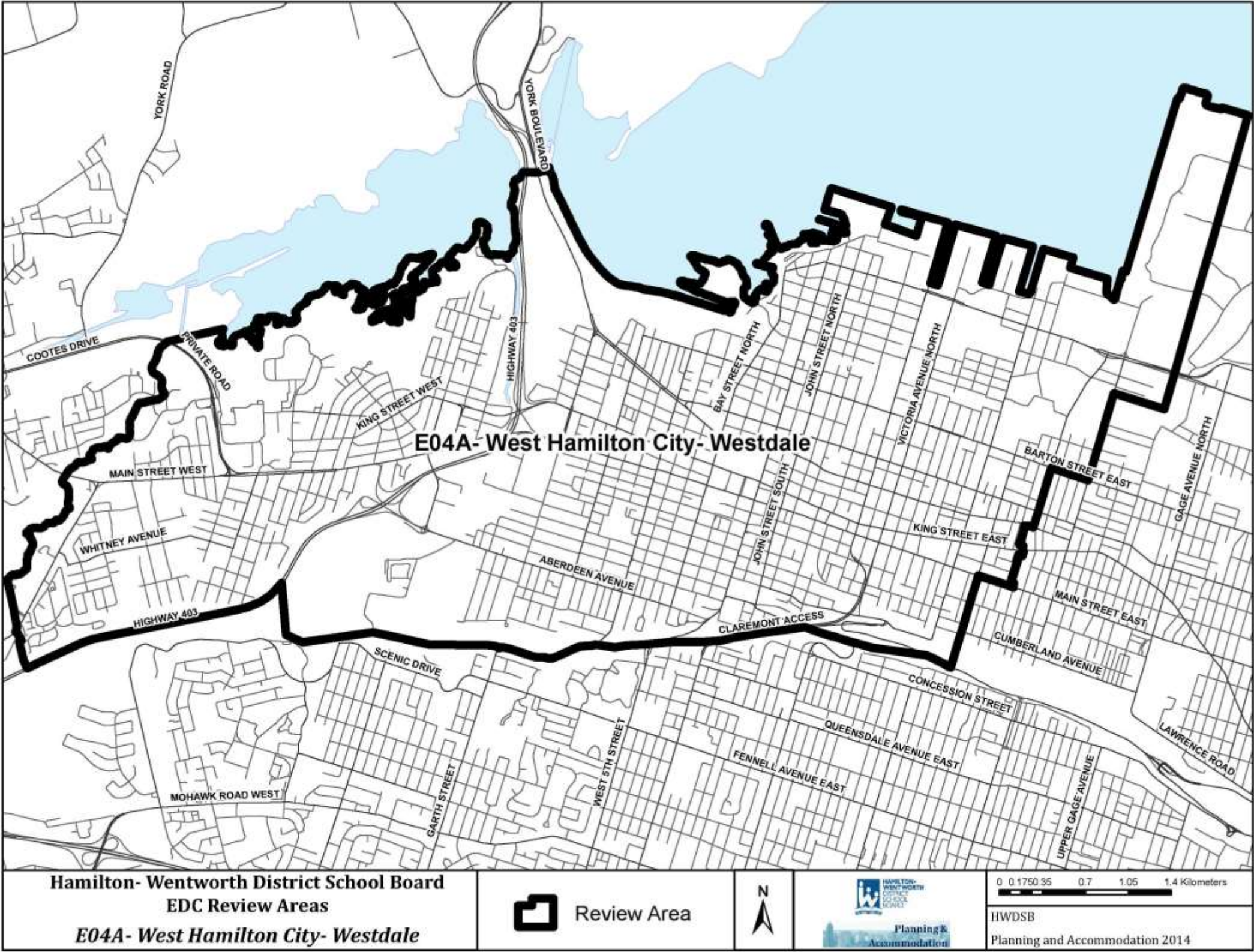
Review Area: E03A - East Glanbrook				Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils		
Projected Housing Growth																							
	Singles			118	127	117	117	117	117	197	261	231	231	263	171	171	171	171	0.2850	2,580	735		
	Medium Density			86	86	86	86	86	247	240	183	183	236	238	154	154	207	154	0.1449	2,426	352		
	Apartments			0	0	0	0	0	26	0	0	33	22	0	0	0	0	0	0.0390	81	3		
A	Total Gross Dwelling Units			204	213	203	203	229	364	437	444	447	489	501	325	325	378	325	0.2143	5,087	1,090		
Requirements of Existing Community:																							
B	Review Area Schools			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities	
B1	Michaëlle Jean			282	86	114	140	162	184	194	210	215	223	222	218	219	219	220	220	220		0	
B2																							
B3																							
B4																							
B5																							
B6																							
B7																							
B8																							
B9																							
B10																							
B11																							
B12																							
B13																							
B14																							
B15																							
B16																							
B17																							
	Totals			282	86	114	140	162	184	194	210	215	223	222	218	219	219	220	220	220		0	
	Total Available Pupil Spaces to Accommodate Growth					196	168	142	120	98	88	72	67	59	60	64	63	63	63	62	62		
C	Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities	
C1	Bellmoore			638	722	756	773	802	827	841	859	877	882	879	851	855	858	861	864	867		0	
C2																							
C3																							
C4																							
C5																							
C6																							
C7																							
C8																							
	Totals			638	722	756	773	802	827	841	859	877	882	879	851	855	858	861	864	867		0	
	Total Available Pupil Spaces to Accommodate Growth				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
D	Requirements of New Development for High Growth Areas (Cumulative):					43	87	127	171	215	291	382	491	594	695	802	873	946	1,018	1,090			
E	Less: Available Pupil Places to Accommodate Growth																				0		
F	Equals: Net growth-related Pupil Place Requirements																				1,090		
Description of Growth-related Need: Michaëlle Jean is a single-track French Immersion school for the Mountain and is not available to address English-language programs The Binbrook -- South of Binbrook Road site is designated and identified by the Board as being 5.63 acres.																							
Growth-related Net Education Lands Costs		Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs							
1 Binbrook -- South of Binbrook Road		Designated	2019	589	589	100.0%	5.63	5.63	\$550,000	\$3,096,500	\$385,148	\$855,506	\$57,266		\$2,843	\$4,397,263							
2 Binbrook		TBD	2025	501	589	85.1%	6.00	5.10	\$550,000	\$2,807,521	\$349,204	\$775,666	\$102,529		\$2,610	\$4,037,530							
3																							
4																							
5																							



Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

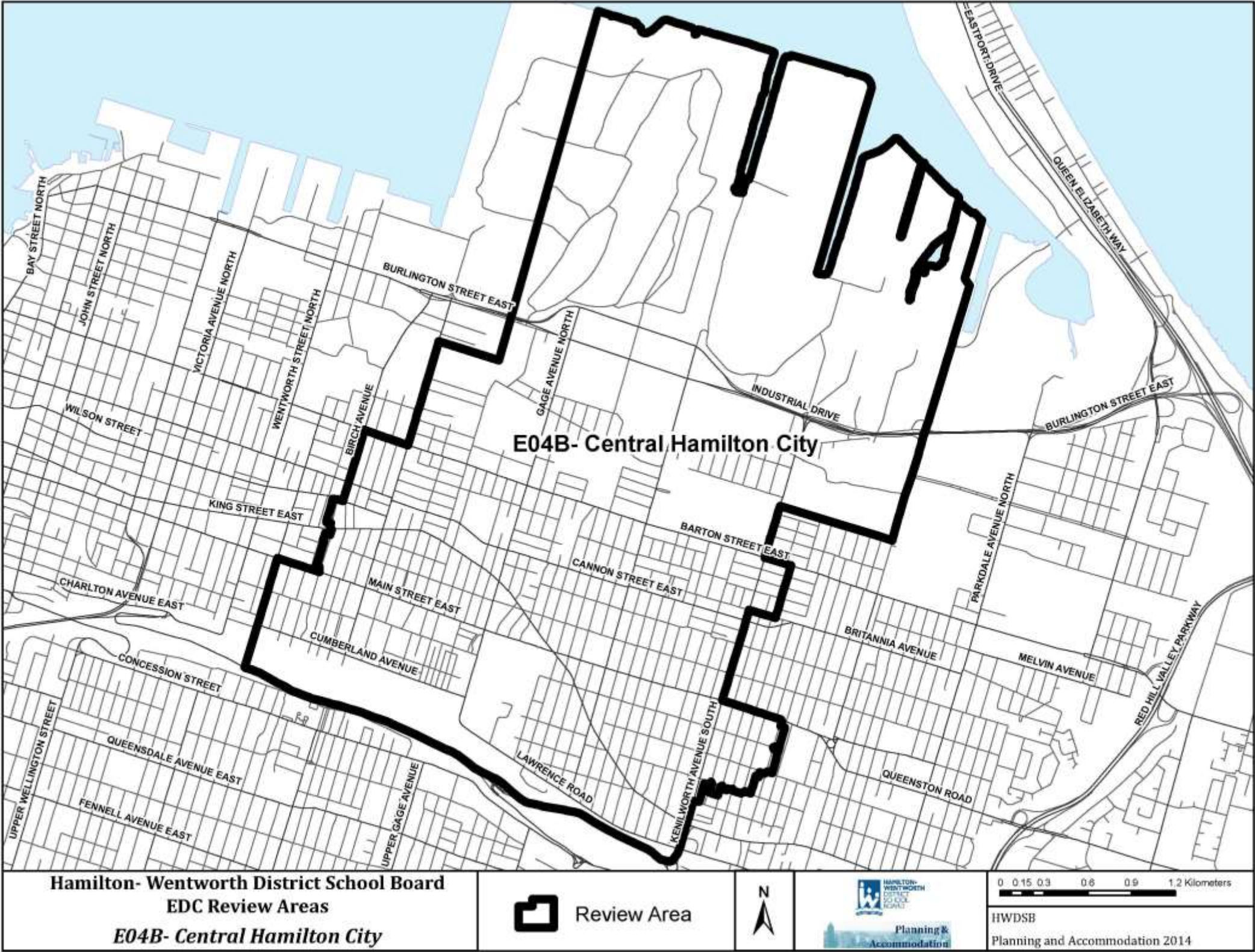
<b>Review Area: E03B - East Glanbrook and Upper Stoney Creek</b>			Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
<b>Projected Housing Growth</b>																				
Singles			235	267	251	292	203	126	373	285	262	384	369	369	369	369	369	0.2804	4,523	1,268
Medium Density			308	315	281	301	157	152	378	354	356	271	271	229	229	229	229	0.1751	4,060	711
Apartments			8	4	8	8	4	42	43	0	0	0	314	314	314	314	314	0.0390	1,687	66
<b>A Total Gross Dwelling Units</b>			551	586	540	601	364	320	794	639	618	655	954	912	912	912	912	0.1991	10,270	2,045
<b>Requirements of Existing Community:</b>																				
<b>B</b>	<b>Review Area Schools</b>	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities
B1	Billy Green	354	415	417	411	409	402	407	395	407	410	401	399	403	406	408	410	412		0
B2	Gatestone	575	648	635	609	594	584	575	554	551	538	531	530	532	535	538	541	543		3
B3	Janet Lee	368	426	425	422	429	421	430	423	420	409	413	408	405	402	399	396	393		0
B4	Mount Albion	308	290	284	274	274	271	273	279	294	292	292	290	288	286	285	284	283		10
B5	Tapleystown	305	183	178	168	164	157	156	149	151	147	146	148	150	152	153	154	154		0
B6																				
B7																				
B8																				
B9																				
B10																				
B11																				
B12																				
B13																				
B14																				
B15																				
B16																				
B17																				
<b>Totals</b>		1,910	1,962	1,939	1,884	1,870	1,835	1,840	1,800	1,824	1,796	1,784	1,775	1,778	1,780	1,782	1,784	1,785		13
Total Available Pupil Spaces to Accommodate Growth			0	0	26	40	75	70	110	86	114	126	135	132	130	128	126	125		
<b>C</b>	<b>Review Area Schools Impacted by Housing Growth:</b>	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities
C1																				
C2																				
C3																				
C4																				
C5																				
C6																				
C7																				
C8																				
<b>Totals</b>		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		0
Total Available Pupil Spaces to Accommodate Growth			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
<b>D</b>	<b>Requirements of New Development for High Growth Areas (Cumulative):</b>			119	248	367	502	588	665	852	1,006	1,155	1,320	1,464	1,609	1,754	1,895	2,045		
<b>E</b>	Less: Available Pupil Places to Accommodate Growth																		-125	
<b>F</b>	Equals: Net growth-related Pupil Place Requirements																		1,920	
<b>Description of Growth-related Need:</b> Red Hill -- Summit Estates E. @ Bellagio Ave. has been identified by the Board as a designated site with a site size of 8.07 acres Nash, First Road West @ Green Mountain Rd. has been identified by the Board as a designated site with a site size of 6.17 acres																				
<b>Growth-related Net Education Lands Costs</b>		Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs				
1 Red Hill -- Summit Estates E. @ Bellagio Ave.		Designated	2015	589	589	100.0%	8.07	8.07	\$550,000	\$4,438,500	\$552,068	\$221,925	\$33,791		\$3,394	\$5,249,678				
2 Nash, First Road West & Green Mountain Rd.		Designated	2020	589	589	100.0%	6.17	6.17	\$550,000	\$3,393,500	\$422,089	\$937,561	\$72,456		\$3,122	\$4,828,728				
3 East Glanbrook and Upper Stoney Creek #1		TBD	2024	589	589	100.0%	6.00	6.00	\$550,000	\$3,300,000	\$410,460	\$911,729	\$110,102		\$3,061	\$4,735,352				
4 To be accommodated in existing facilities				153																
5																				





## EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014





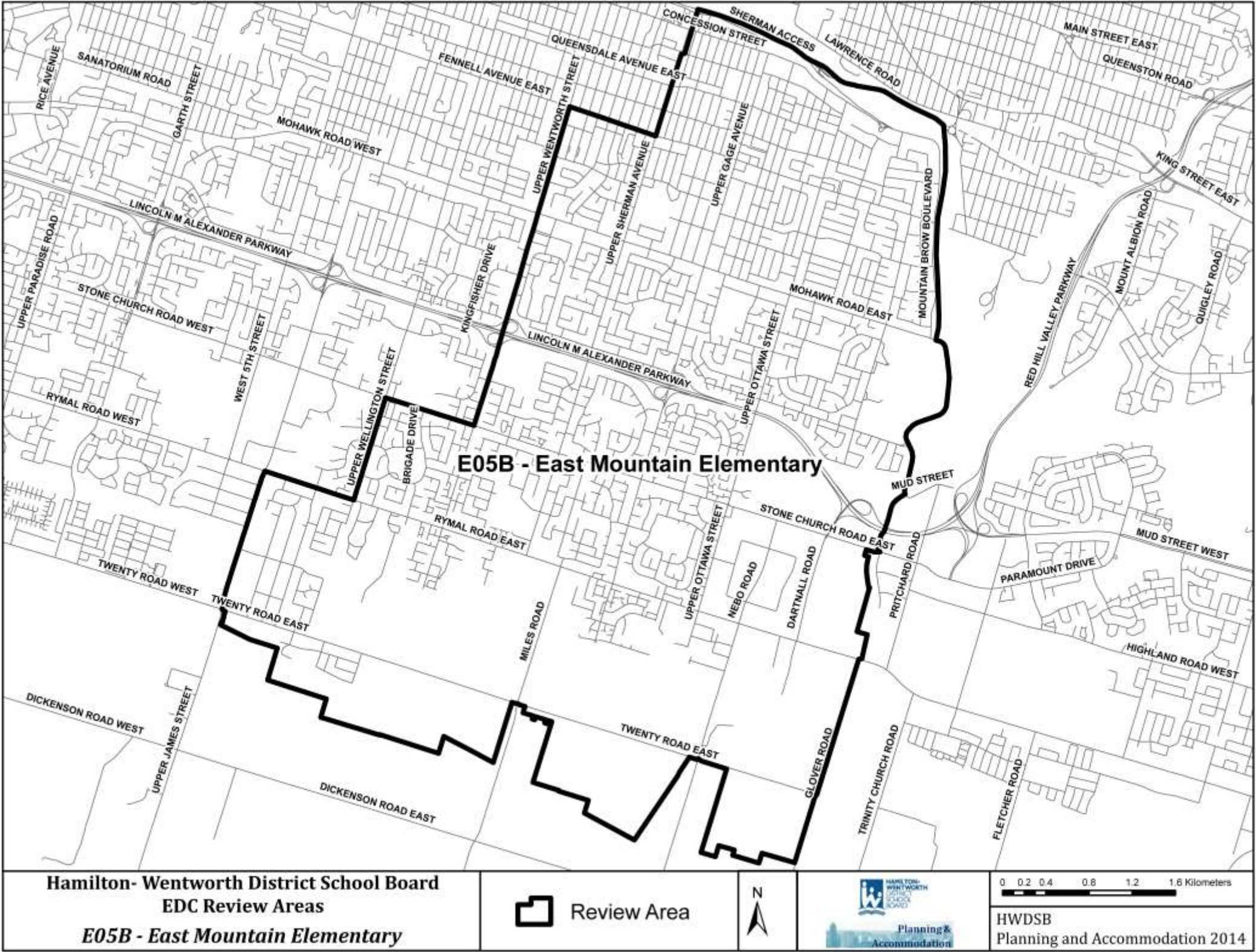
Review Area: E04B - Central Hamilton City							Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																								
	Singles						0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0000	-	-
	Medium Density						0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0000	-	-
	Apartments						0	0	0	47	34	11	0	0	0	0	0	0	0	170	170	0.0130	432	6
A	Total Gross Dwelling Units						0	0	0	47	34	11	0	0	0	0	0	0	0	170	170	0.0130	432	6
Requirements of Existing Community:																								
B	Review Area Schools			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities	
B1	A.M. Cunningham			420	437	424	426	423	411	410	419	417	419	422	426	429	432	434	436	437			6	
B2	Adelaide Hoodless			547	416	408	397	399	390	394	391	394	398	391	390	393	395	397	399	400			0	
B3	Memorial (City)			636	492	477	466	463	449	438	421	415	409	407	406	407	409	411	412	412			0	
B4	Prince of Wales			786	667	696	721	743	755	765	773	773	767	750	740	736	732	728	724	722			0	
B5	Queen Mary			671	600	598	594	604	599	602	595	586	570	544	539	536	534	531	528	527			0	
B6																								
B7																								
B8																								
B9																								
B10																								
B11																								
B12																								
B13																								
B14																								
B15																								
B16																								
B17																								
	Totals			3,060	2,612	2,602	2,603	2,632	2,603	2,610	2,598	2,584	2,562	2,515	2,500	2,501	2,501	2,501	2,498	2,499			6	
	Total Available Pupil Spaces to Accommodate Growth				448	458	457	428	457	450	462	476	498	545	560	560	559	559	562	561				
C	Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9										





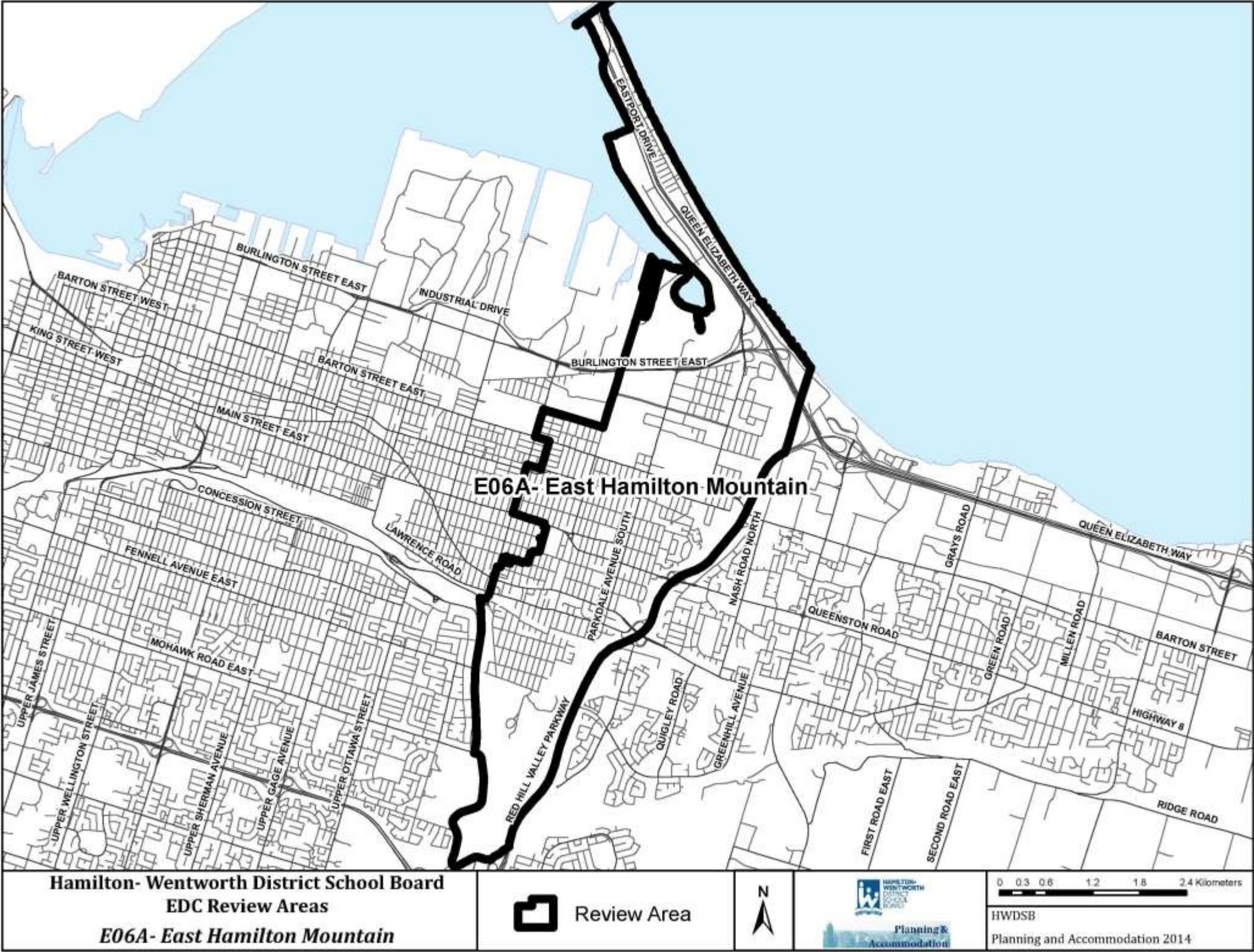


Review Area: E05A - Central Mountain					Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																						
	Singles			16	8	49	24	25	35	35	35	0	0	0	0	0	0	0	0	0.1884	227	43
	Medium Density			10	10	10	10	10	10	10	13	13	13	13	13	13	13	13	13	0.0799	174	14
	Apartments			0	8	0	0	37	0	0	0	0	0	0	0	0	0	0	0	0.0390	45	2
A	Total Gross Dwelling Units			26	26	59	34	72	45	45	48	13	13	13	13	13	13	13	13	0.1310	446	58
Requirements of Existing Community:																						
B	Review Area Schools	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND		Number of Temp. Facilities	
B1	Cardinal Heights	332	307	299	273	263	278	275	293	275	270	249	243	244	243	243	242	244			0	
B2	Eastmount Park	348	207	206	204	199	205	210	208	206	206	208	208	208	208	208	208	208			0	
B3	Franklin Road	446	341	331	309	303	294	284	280	269	267	262	266	270	274	276	279	281			0	
B4	George L. Armstrong	588	321	316	310	313	290	266	264	264	252	253	247	244	241	241	241	240			0	
B5	Linden Park	319	160	157	151	151	149	145	142	140	140	140	140	141	141	143	145	146			0	
B6	Norwood Park	475	486	437	431	421	416	405	395	391	388	390	386	388	389	391	394	396			8	
B7	Pauline Johnson	302	248	251	259	259	247	246	239	243	245	248	250	253	255	256	257	257			0	
B8	Queensdale	279	180	188	181	185	183	184	183	187	183	183	184	185	186	186	186	187			0	
B9	Ridgemount	250	275	276	263	262	250	250	238	230	230	229	227	226	226	226	226	226			4	
B10																						
B11																						
B12																						
B13																						
B14																						
B15																						
B16																						
B17																						
	Totals	3,339	2,525	2,461	2,382	2,356	2,313	2,264	2,243	2,205	2,181	2,162	2,153	2,159	2,163	2,170	2,177	2,184			12	
	Total Available Pupil Spaces to Accommodate Growth		814	878	957	983	1,026	1,075	1,096	1,134	1,158	1,17										



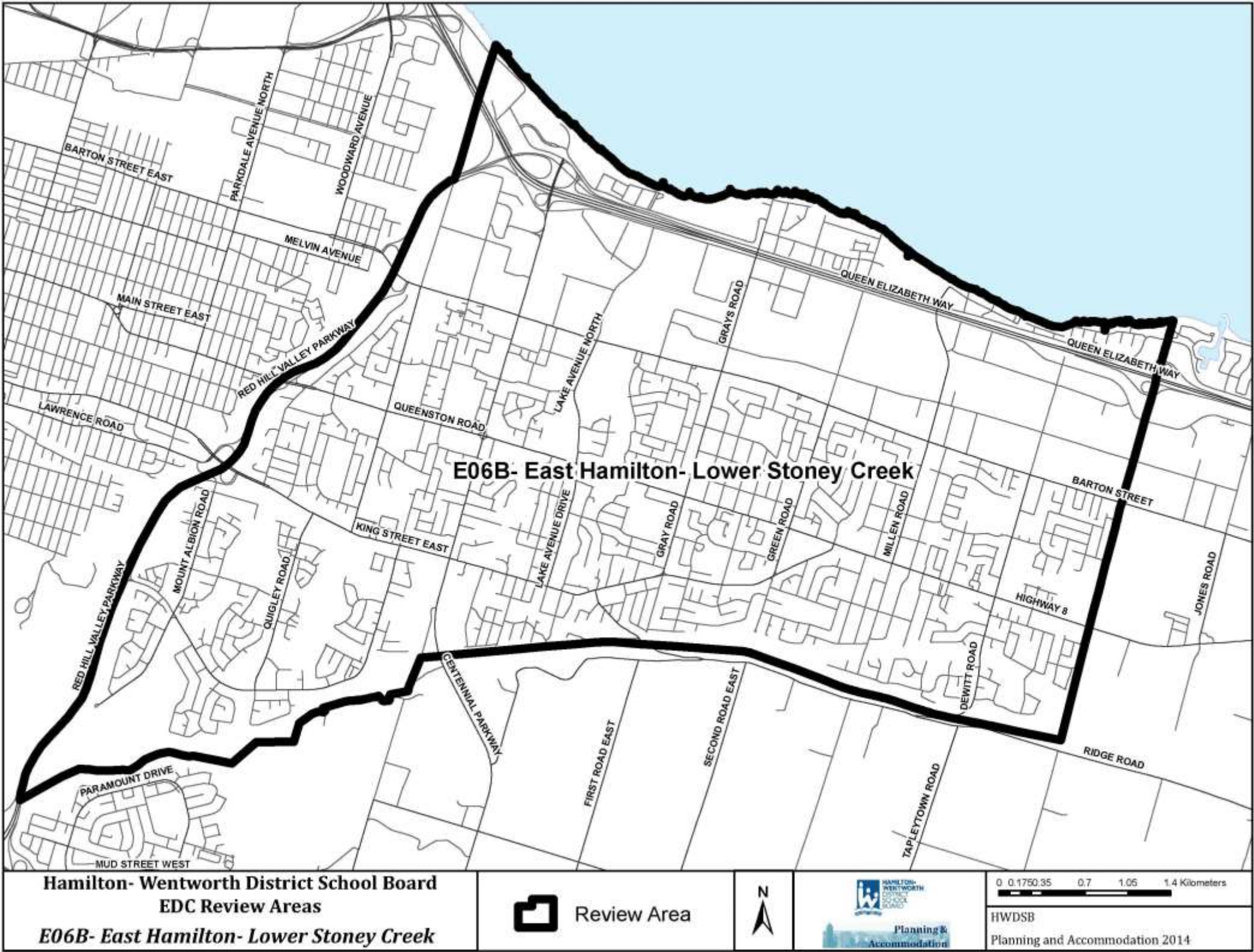
Review Area: E05B - East Mountain							Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																								
	Singles			0	147	146	147	153	69	66	30	0	0	172	173	173	173	173	173	173	0.3310	1,622	537	
	Medium Density			0	0	16	0	49	50	50	13	15	0	0	0	0	0	0	0	0	0.0899	193	17	
	Apartments			0	11	0	0	0	10	16	0	0	0	0	0	0	0	0	0	0	0.0390	37	1	
A	Total Gross Dwelling Units			0	158	162	147	202	129	132	43	15	0	172	173	173	173	173	173	173	0.3001	1,852	556	
Requirements of Existing Community:																								
B	Review Area Schools	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND			Number of Temp. Facilities		
B1	Cecil B. Stirling	314	343	346	331	319	305	308	299	291	295	285	285	288	292	295	298	301			8			
B2	Helen Detwiler	483	574	557	548	539	543	552	543	536	548	536	537	540	541	543	543	543			8			
B3	Highview	516	447	457	468	470	473	467	469	459	460	466	454	454	453	452	451	450			0			
B4	Huntington Park	458	427	427	433	427	431	440	444	436	429	431	423	421	419	417	415	413			8			
B5	Lawfield	633	708	708	700	688	684	679	673	667	659	662	658	661	664	667	670	673			6			
B6	Lincoln M. Alexander	314	206	205	209	213	216	214	219	220	220	223	225	228	230	232	233	234			0			
B7	Lisgar	380	284	275	285	274	276	276	279	270	265	267	263	260	258	257	256	255			0			
B8	Ray Lewis	599	661	653	626	609	590	593	580	564	569	574	574	576	578	579	580	582			2			
B9	Richard Beasley	256	193	201	197	194	187	184	185	180	181	183	184	185	185	185	184	182			0			
B10	Templemead	495	593	568	553	521	521	496	491	463	462	457	456	457	458	460	461	462			6			
B11																								
B12																								
B13																								
B14																								
B15																								
B16																								
B17																								
	Totals	4,448	4,436	4,398	4,350	4,253	4,224	4,208	4,181	4,087	4,087	4,084	4,059	4,070	4,078	4,087								






Review Area: E06A - East Hamilton Mountain							Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																								
	Singles			0	0	0	0	11	11	0	0	0	0	0	0	0	0	0	0	0	0	0.1888	22	4
	Medium Density			0	0	0	0	12	0	0	0	0	0	0	0	0	0	0	0	0	0.0935	12	1	
	Apartments			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0000	-	-	
A	Total Gross Dwelling Units			0	0	0	0	23	11	0	0	0	0	0	0	0	0	0	0	0	0.1551	34	5	
Requirements of Existing Community:																								
B	Review Area Schools	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND			Number of Temp. Facilities		
B1	Hillcrest	690	456	441	401	394	396	393	384	368	365	359	354	355	355	356	357	356			0			
B2	Parkdale	291	161	161	161	163	159	161	164	164	164	164	163	164	164	165	165	166			0			
B3	Rosedale	236	160	159	153	143	143	145	147	137	138	139	140	141	143	146	148	149			0			
B4	Roxborough Park	371	223	221	226	223	212	210	202	200	202	203	204	205	206	206	206	206			0			
B5	Viscount Montgomery	469	321	304	293	303	294	294	272	281	280	277	271	273	275	276	278	280			0			
B6	W.H. Ballard	837	585	573	553	544	556	557	550	554	547	546	547	548	551	551	551	551			0			
B7	Woodward	201	132	131	130	126	125	125	123	125	127	128	129	130	130	130	129	128			0			
B8																								
B9																								
B10																								
B11																								
B12																								
B13																								
B14																								
B15																								
B16																								
B17																								
	Totals	3,095	2,038	1,989	1,916	1,896	1,885	1,884	1,840	1,829	1,822	1,816	1,808	1,817	1,824	1,829	1,833	1,836			0			
	Total Available Pupil Spaces to Accommodate Growth		1,057	1,106	1,179	1,199	1,210	1,211	1,255	1,266	1,273	1,279	1,287	1,279	1,271	1,266	1,262	1,259						
C	Review Area Schools Impacted by Housing Growth:	OTG Capacity	Current 2013/14	Year 1 2014/15																				



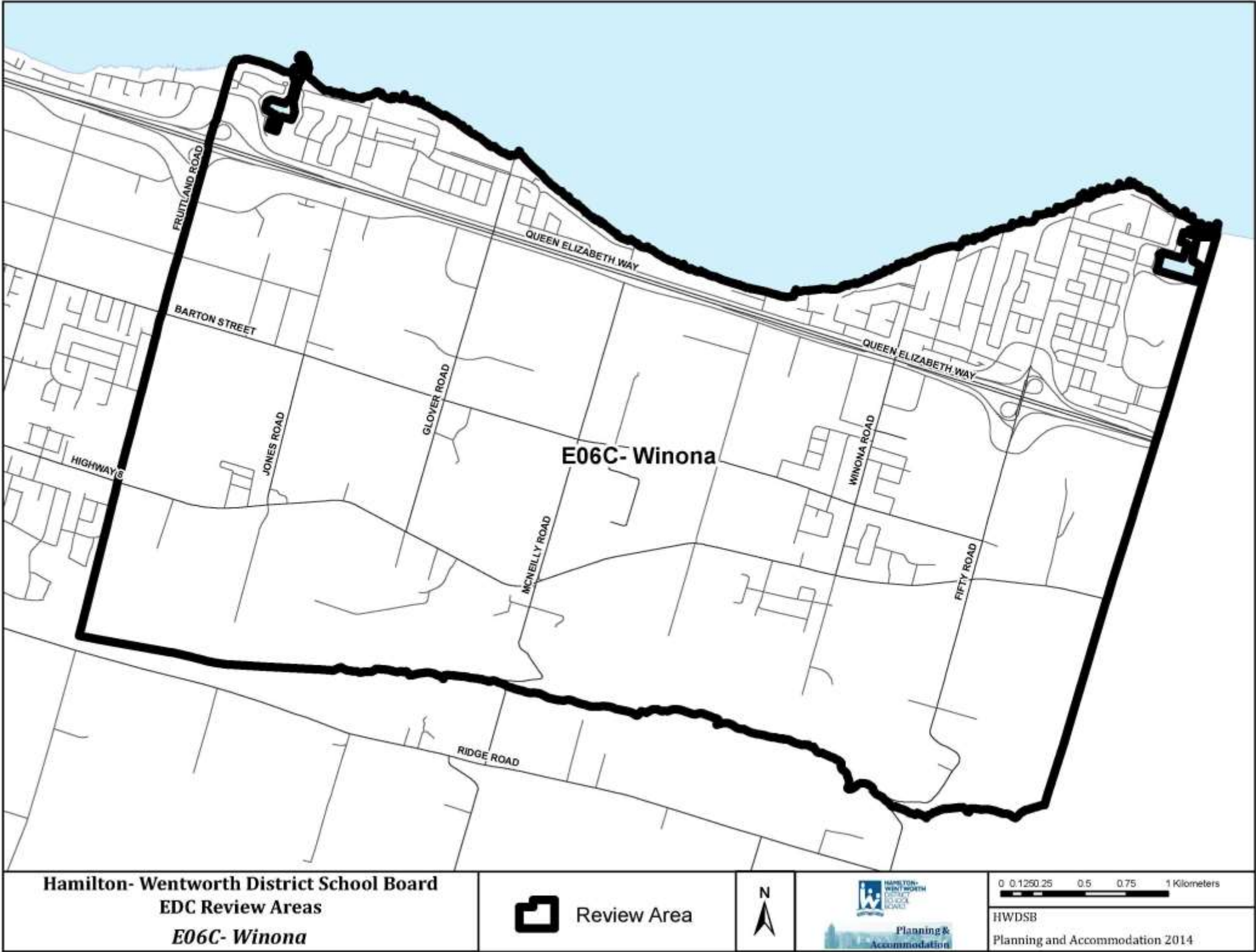


Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

<b>Review Area: E06B - East Hamilton - Lower Stoney Creek</b>			Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils	
<b>Projected Housing Growth</b>																					
Singles			0	60	60	90	57	35	24	0	0	0	0	0	0	0	0	0.3098	326	101	
Medium Density			47	79	64	64	64	64	64	88	88	0	88	0	88	0	88	0.1153	886	102	
Apartments			40	145	14	39	37	4	0	90	120	55	35	0	142	160	206	0.0200	1,087	22	
<b>A Total Gross Dwelling Units</b>			<b>87</b>	<b>284</b>	<b>138</b>	<b>193</b>	<b>158</b>	<b>103</b>	<b>88</b>	<b>178</b>	<b>208</b>	<b>55</b>	<b>123</b>	<b>0</b>	<b>230</b>	<b>160</b>	<b>294</b>	<b>0.0978</b>	<b>2,299</b>	<b>225</b>	
<b>Requirements of Existing Community:</b>																					
<b>B</b>	<b>Review Area Schools</b>	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities	
B1	Collegiate Avenue	357	275	257	257	251	248	251	257	262	266	259	261	262	264	266	268	268		0	
B2	Eastdale	247	203	202	200	196	191	186	191	191	184	190	189	191	193	195	197	199		0	
B3	Elizabeth Bagshaw	653	366	349	340	343	341	337	336	332	333	329	327	330	333	336	338	340		0	
B4	Glen Brae	271	287	307	320	316	316	318	307	305	295	297	291	293	295	298	301	304		0	
B5	Glen Echo	328	287	276	272	261	263	259	265	263	265	268	270	273	275	278	279	280		4	
B6	Green Acres	381	326	321	304	299	293	285	282	273	275	277	275	278	281	284	285	287		0	
B7	Lake Avenue	546	573	560	557	545	537	528	524	526	522	522	522	525	528	531	534	535		6	
B8	Memorial (Stoney Creek)	352	334	345	336	338	345	344	340	334	330	335	332	333	334	335	336	336		0	
B9	Mountain View	248	324	309	311	307	304	301	302	302	294	295	291	293	295	297	300	302		8	
B10	R.L. Hyslop	285	178	169	157	151	147	142	139	142	142	141	144	145	146	147	147	148		0	
B11	Sir Isaac Brock	256	198	194	185	181	178	175	167	170	172	173	176	178	180	182	184	186		0	
B12	Sir Wilfrid Laurier	737	493	480	468	461	455	453	444	445	445	447	447	449	450	451	453	455		0	
B13																					
B14																					
B15																					
B16																					
B17																					
<b>Totals</b>		<b>4,661</b>	<b>3,844</b>	<b>3,769</b>	<b>3,708</b>	<b>3,648</b>	<b>3,618</b>	<b>3,578</b>	<b>3,553</b>	<b>3,544</b>	<b>3,523</b>	<b>3,533</b>	<b>3,526</b>	<b>3,548</b>	<b>3,573</b>	<b>3,598</b>	<b>3,621</b>	<b>3,641</b>		<b>18</b>	
<b>Total Available Pupil Spaces to Accommodate Growth</b>			<b>817</b>	<b>892</b>	<b>953</b>	<b>1,013</b>	<b>1,043</b>	<b>1,083</b>	<b>1,108</b>	<b>1,117</b>	<b>1,138</b>	<b>1,128</b>	<b>1,135</b>	<b>1,113</b>	<b>1,088</b>	<b>1,063</b>	<b>1,040</b>	<b>1,020</b>			
<b>C</b>	<b>Review Area Schools Impacted by Housing Growth:</b>	OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities	
C1																					
C2																					
C3																					
C4																					
C5																					
C6																					
C7																					
C8																					
<b>Totals</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>		<b>0</b>	
<b>Total Available Pupil Spaces to Accommodate Growth</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>			
<b>D</b>	<b>Requirements of New Development for High Growth Areas (Cumulative):</b>			<b>7</b>	<b>37</b>	<b>63</b>	<b>98</b>	<b>123</b>	<b>142</b>	<b>159</b>	<b>174</b>	<b>190</b>	<b>192</b>	<b>203</b>	<b>200</b>	<b>212</b>	<b>212</b>	<b>225</b>			
<b>E</b>	Less: Available Pupil Places to Accommodate Growth																			<b>0</b>	
<b>F</b>	Equals: Net growth-related Pupil Place Requirements																			<b>225</b>	
<b>Description of Growth-related Need:</b>																					
<b>Growth-related Net Education Lands Costs</b>		Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs					
1	To be accommodated in existing facilities			225																	
2																					
3																					
4																					
5																					








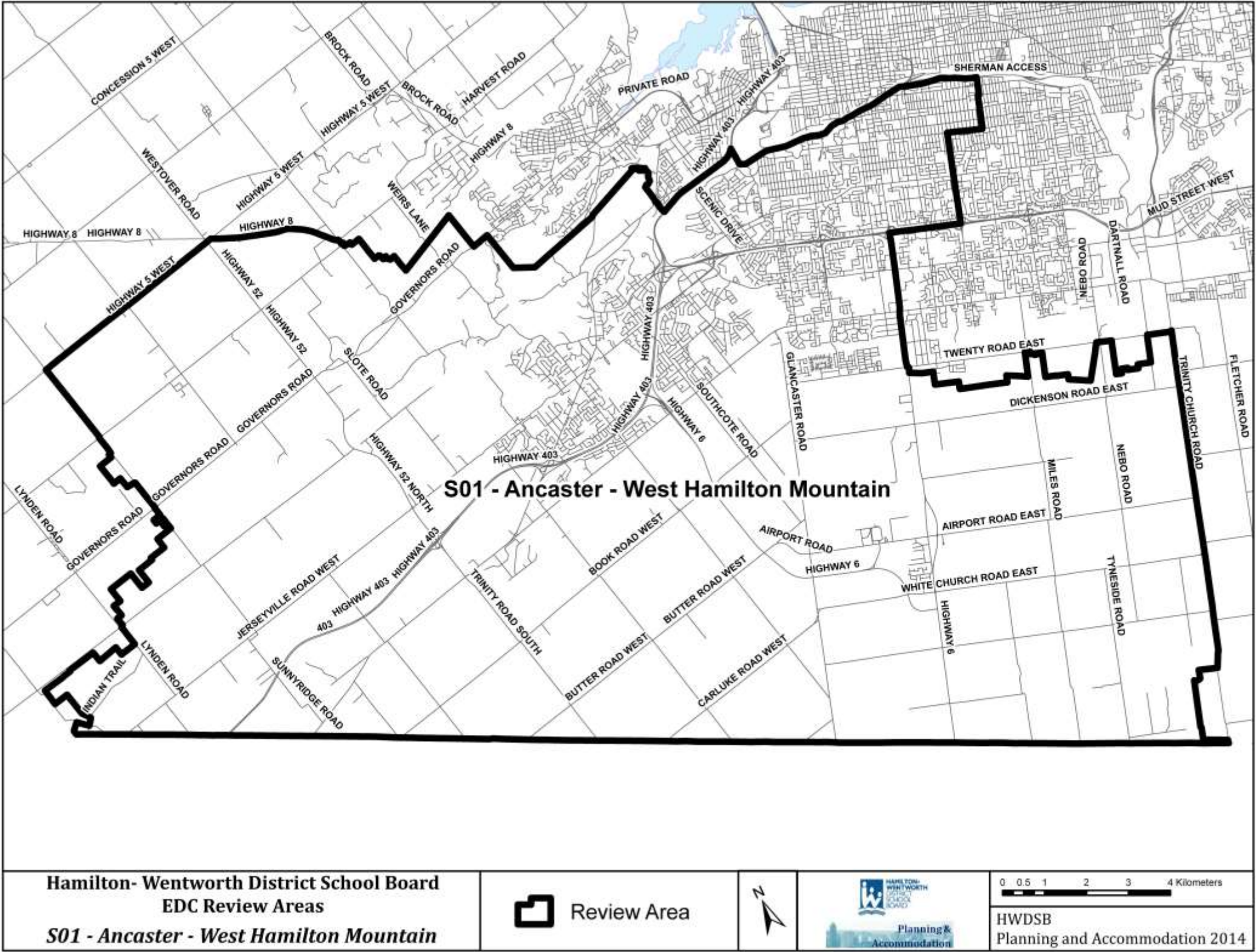


Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

Review Area: E06C - Winona			Year 1 2014/15	Year 2 2015/2016	Year 3 2016/2017	Year 4 2017/2018	Year 5 2018/2019	Year 6 2019/2020	Year 7 2020/2021	Year 8 2021/2022	Year 9 2022/2023	Year 10 2023/2024	Year 11 2024/2025	Year 12 2025/2026	Year 13 2026/2027	Year 14 2027/2028	Year 15 2028/2029	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils	
Projected Housing Growth																					
Singles			54	10	0	0	117	187	187	187	205	205	225	225	225	245	250	0.2980	2,322	692	
Medium Density			26	42	43	76	184	300	255	255	305	305	320	320	405	410	410	0.1266	3,656	463	
Apartments			0	0	0	0	0	50	0	57	7	57	50	50	50	50	50	0.0390	421	16	
A Total Gross Dwelling Units			80	52	43	76	301	537	442	499	517	567	595	595	680	705	710	0.1831	6,399	1,171	
Requirements of Existing Community:																					
B Review Area Schools			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities
B1																					
B2																					
B3																					
B4																					
B5																					
B6																					
B7																					
B8																					
B9																					
B10																					
B11																					
B12																					
B13																					
B14																					
B15																					
B16																					
B17																					
Totals			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Available Pupil Spaces to Accommodate Growth				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
C Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Year 15 ROND	Number of Temp. Facilities
C1 Winona			770	831	858	874	894	909	919	928	950	940	932	919	924	929	935	941	944	0	
C2																					
C3																					
C4																					
C5																					
C6																					
C7																					
C8																					
Totals			770	831	858	874	894	909	919	928	950	940	932	919	924	929	935	941	944	0	
Total Available Pupil Spaces to Accommodate Growth				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
D Requirements of New Development for High Growth Areas (Cumulative):				19	27	33	43	100	196	283	372	471	575	687	798	920	1,047	1,171			
E Less: Available Pupil Places to Accommodate Growth																				0	
F Equals: Net growth-related Pupil Place Requirements																				1,171	
Description of Growth-related Need:																					
Fruitland -- Winona, Jones Road @ Barton St. East has been identified by the Board as a designated site with a site size of 6 acres																					
Growth-related Net Education Lands Costs			Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs				
1 Fruitland - Winona, Jones Rd. @ Barton St. E.			Designated	2022	589	589	100.0%	6.00	6.00	\$650,000	\$3,900,000	\$410,460	\$1,077,498	\$89,888		\$3,544	\$5,481,390				
2																					
3																					
4																					
5																					

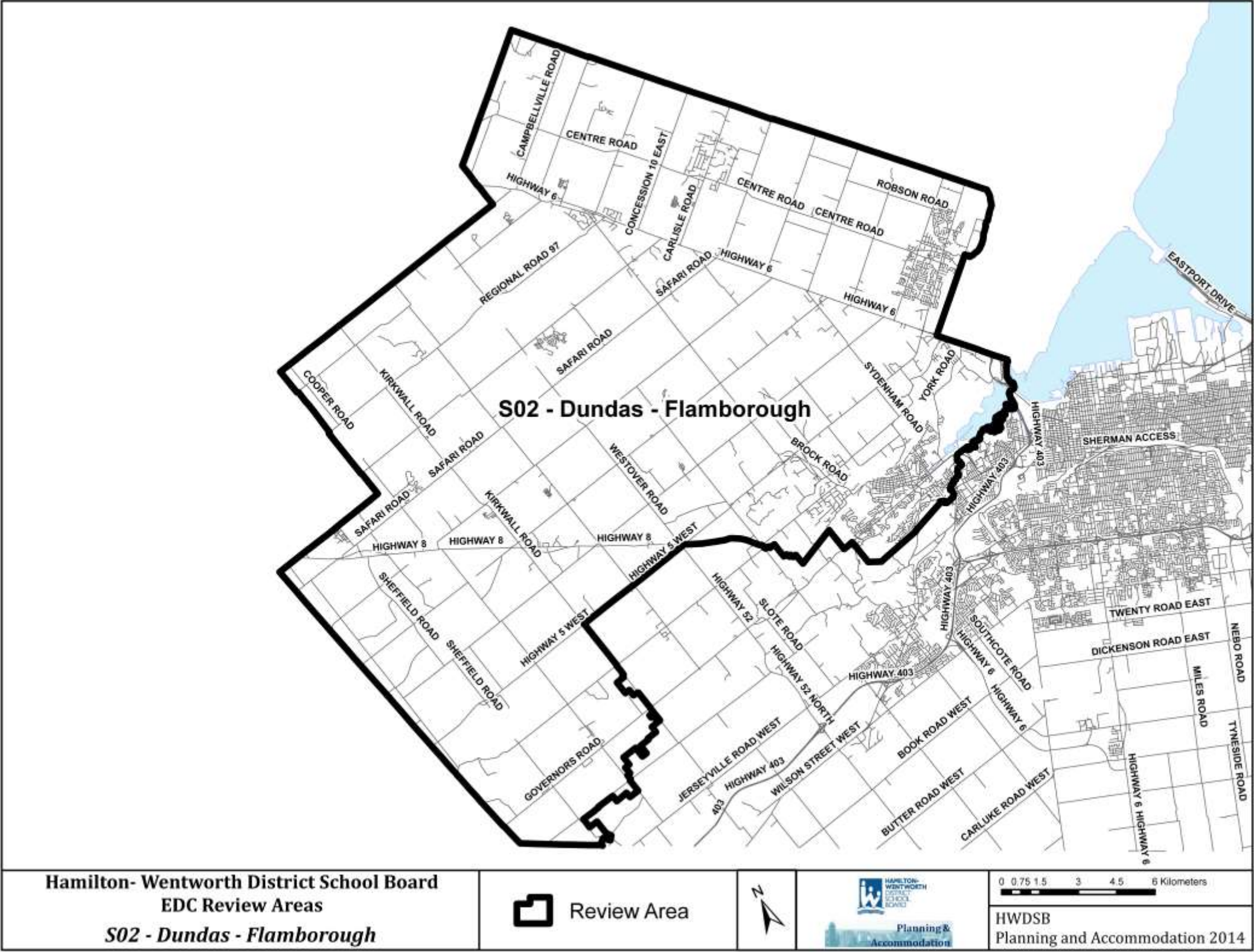


## *Secondary Review Areas*



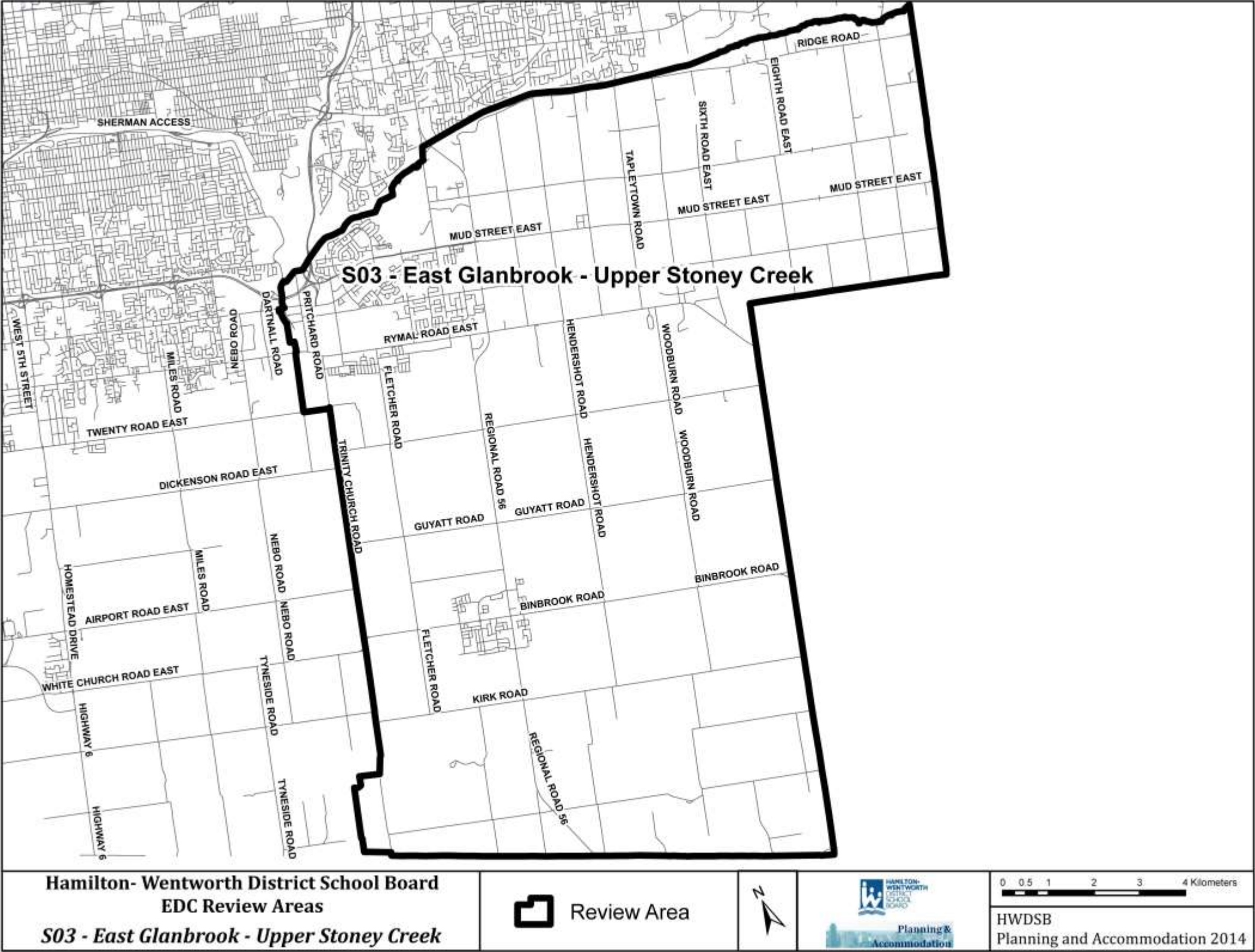
[illegible]





[illegible]

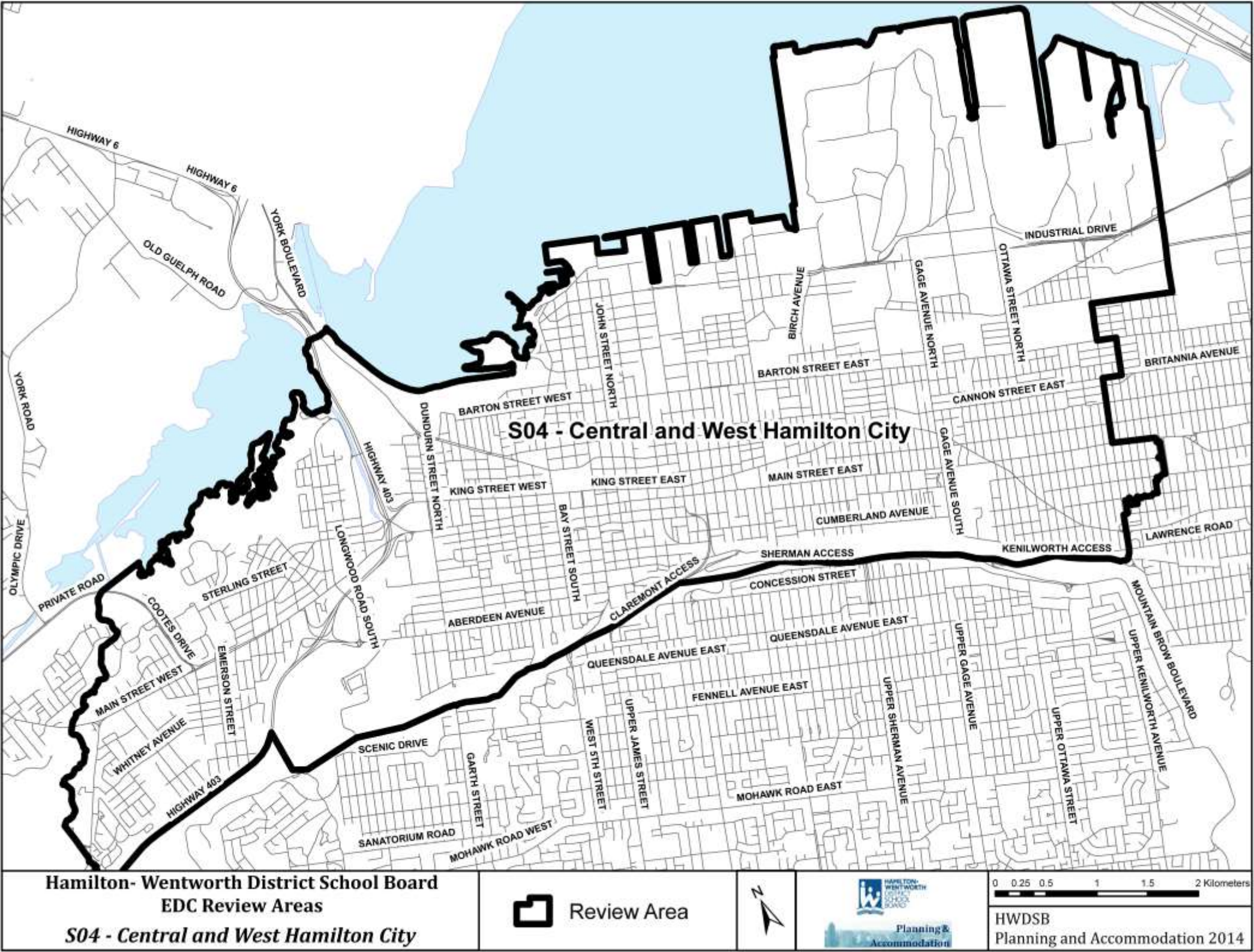




Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

Review Area: S03 - East Glanbrook - Upper Stoney Creek				Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Weighted/Blended Secondary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																					
	Singles			353	394	368	409	320	243	570	546	493	615	632	540	540	540	540	0.0983	7,103	698
	Medium Density			394	401	367	387	243	399	618	537	539	507	509	383	383	436	383	0.0586	6,486	380
	Apartments			8	4	8	8	30	42	43	0	33	22	314	314	314	314	314	0.0208	1,768	37
A	Total Gross Dwelling Units			755	799	743	804	593	684	1,231	1,083	1,065	1,144	1,455	1,237	1,237	1,290	1,237	0.0726	15,357	1,115
Requirements of Existing Community:																					
Review Area Schools With Limited Impact From New Development		OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities
B1																					
B2																					
B3																					
B4																					
B5																					
B6																					
B7																					
B8																					
B9																					
B10																					
B11																					
B12																					
B13																					
B14																					
B15																					
B16																					
Totals		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0
Total Available Pupil Spaces to Accommodate Growth			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Review Area Schools Impacted by Housing Growth:		OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities
C1	Saltfleet	954	1,160	1,140	1,215	1,152	1,178	1,196	1,156	1,154	1,158	1,210	1,207	1,267	1,234	1,225	1,165	1,169			12
C2																					
C3																					
C4																					
C5																					
C6																					
C7																					
C8																					
Totals		954	1,160	1,140	1,215	1,152	1,178	1,196	1,156	1,154	1,158	1,210	1,207	1,267	1,234	1,225	1,165	1,169			
Total Available Pupil Spaces to Accommodate Growth			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			12
Requirements of New Development for High Growth Areas (Cumulative):				43	89	132	179	214	262	344	421	496	573	685	795	903	1,013	1,115			
Less: Available Pupil Places to Accommodate Growth																					0
Equals: Net growth-related Pupil Place Requirements																					1,115
Description of Growth-related Need:																					
South Secondary -- Upper Sherman & Ryman has been identified by the Board with a site size of 15 acres																					
Growth-related Net Education Lands Costs		Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs					
1 South Secondary - Upper Sherman & Rymal		TBD	2023	1,115	1,100	100.0%	15.00	15.00	\$550,000	\$8,250,000	\$1,026,149	\$2,279,323	\$249,739		\$7,637	\$11,812,848					
2																					
3																					
4																					
5																					

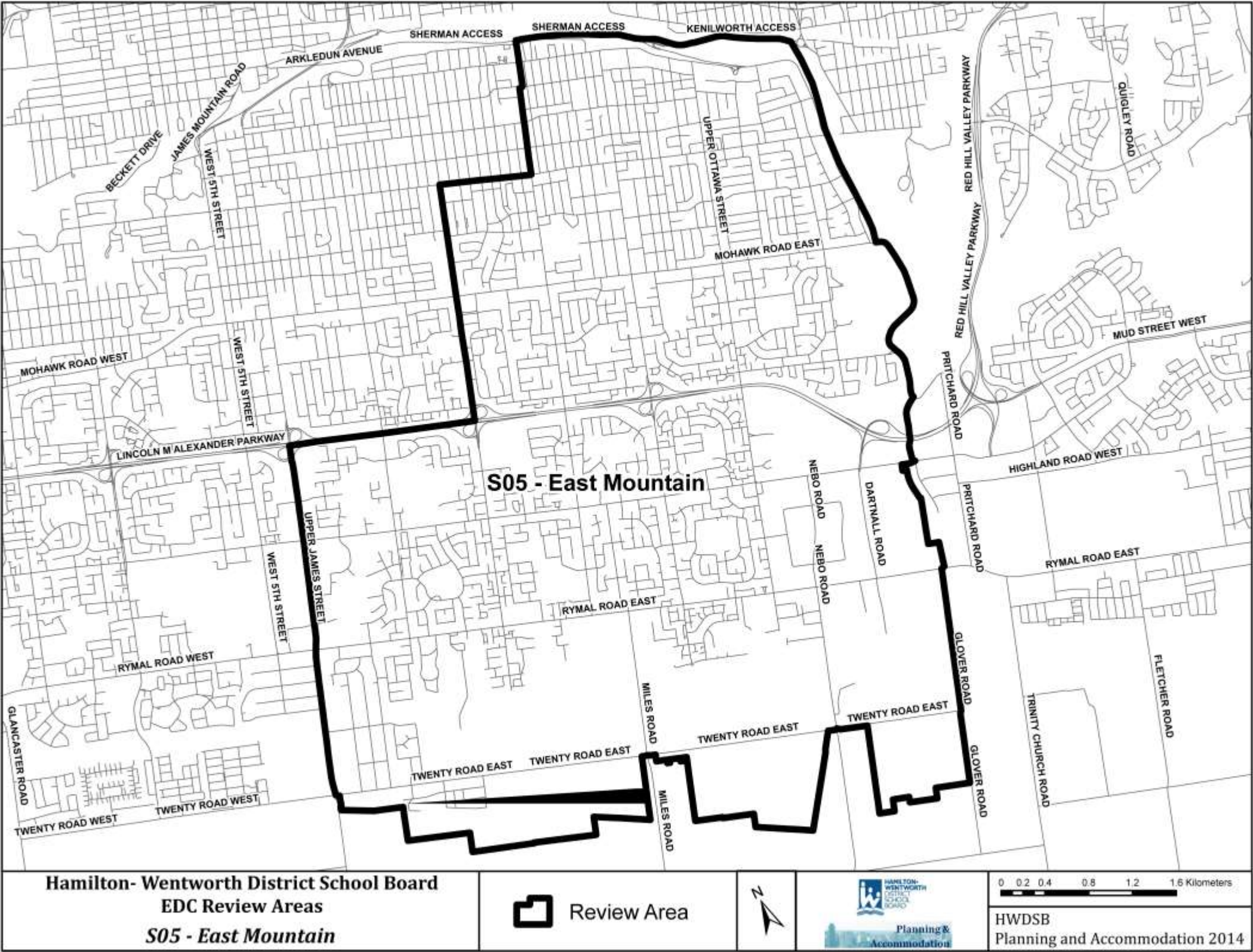




Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

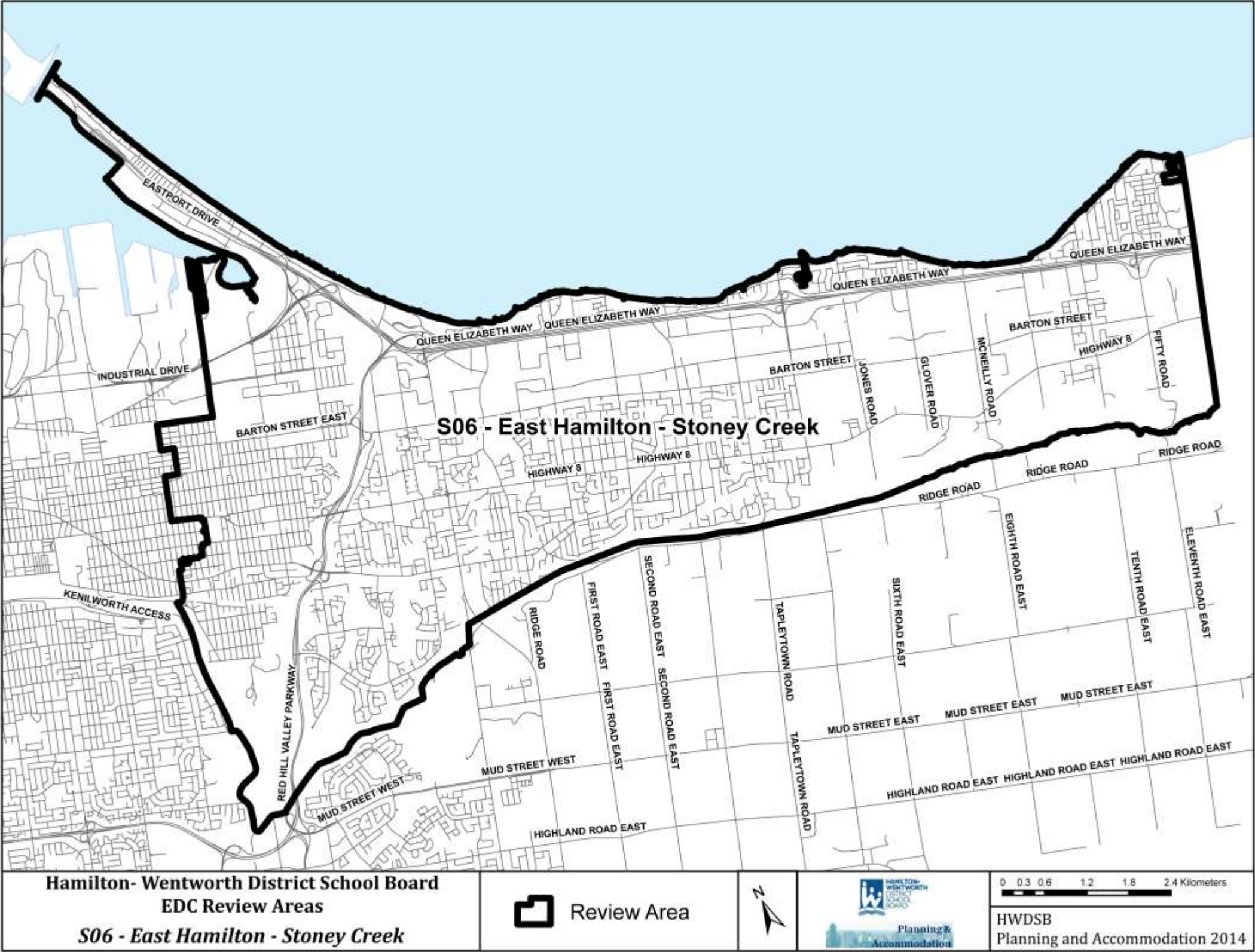
Review Area: S04 - Central and West Hamilton City					Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Weighted/Blended Secondary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																						
Singles					0	0	0	0	0	50	50	50	50	55	55	55	55	55	55	0.0860	530	46
Medium Density					60	14	0	8	27	0	0	0	60	60	65	68	68	68	68	0.0316	566	18
Apartments					198	192	189	546	609	616	477	680	689	610	500	506	599	816	816	0.0068	8,043	55
A Total Gross Dwelling Units					258	206	189	554	636	666	527	730	799	725	620	629	722	939	939	0.0129	9,139	118
Requirements of Existing Community:																						
Review Area Schools With Limited Impact From New Development			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities
B1 Delta(closing 2015/16)			0	698	685	669	0	0	0	0	0	0	0	0	0	0	0	0	0			0
B2 New Secondary School North			1,000	0	0	0	999	980	974	951	988	979	1,026	1,064	1,055	1,055	1,012	992	991			0
B3 Sir John A. Macdonald(closing 2015/16)			0	1,108	1,140	1,106	0	0	0	0	0	0	0	0	0	0	0	0	0			0
B4 Westdale			1,521	1,616	1,618	1,541	1,921	1,986	2,075	2,142	2,178	2,186	2,187	2,140	2,091	1,976	1,808	1,754	1,761			0
B5																						
B6																						
B7																						
B8																						
B9																						
B10																						
B11																						
B12																						
B13																						
B14																						
B15																						
B16																						
Totals			2,521	3,422	3,443	3,316	2,920	2,967	3,049	3,093	3,166	3,165	3,213	3,203	3,146	3,031	2,820	2,746	2,752			0
Total Available Pupil Spaces to Accommodate Growth				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities
C1																						
C2																						
C3																						
C4																						
C5																						
C6																						
C7																						
C8																						
Totals			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Total Available Pupil Spaces to Accommodate Growth				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0
D Requirements of New Development for High Growth Areas (Cumulative):					3	5	7	10	16	24	32	42	53	64	74	84	95	107	118			
E Less: Available Pupil Places to Accommodate Growth																						0
F Equals: Net growth-related Pupil Place Requirements																						118
Description of Growth-related Need:																						
Growth-related Net Education Lands Costs			Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs					
1 To be accommodated in existing facilities					118																	
2																						
3																						
4																						
5																						





[illegible]







Hamilton-Wentworth District School Board - Forms E, F and G  
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2014

<b>Review Area: S06 - East Hamilton - Stoney Creek</b>					Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29	Weighted/Blended Secondary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
<b>Projected Housing Growth</b>																						
Singles					54	70	60	90	185	233	211	187	205	205	225	225	225	245	250	0.0720	2,670	192
Medium Density					73	121	107	140	260	364	319	343	393	305	408	320	493	410	498	0.0324	4,554	148
Apartments					40	145	14	39	37	54	0	147	127	112	85	50	192	210	256	0.0133	1,508	20
<b>A Total Gross Dwelling Units</b>					167	336	181	269	482	651	530	677	725	622	718	595	910	865	1,004	0.0412	8,732	360
<b>Requirements of Existing Community:</b>																						
<b>Review Area Schools With Limited Impact From New Development</b>			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities
B1 Glendale			1,122	963	991	953	941	897	862	838	803	791	776	750	742	728	712	700	706			2
B2 Orchard Park			1,293	1,013	1,029	1,014	999	1,009	1,013	989	978	1,015	1,008	1,045	1,064	1,027	1,029	997	1,011			0
B3 Sir Winston Churchill			1,089	921	862	871	909	931	896	886	901	909	955	917	894	872	837	820	821			2
B4																						
B5																						
B6																						
B7																						
B8																						
B9																						
B10																						
B11																						
B12																						
B13																						
B14																						
B15																						
B16																						
<b>Totals</b>			3,504	2,897	2,882	2,839	2,849	2,837	2,771	2,713	2,683	2,714	2,739	2,712	2,700	2,627	2,578	2,517	2,538			4
<b>Total Available Pupil Spaces to Accommodate Growth</b>				607	622	665	655	667	734	791	821	790	766	792	804	877	926	987	966			
<b>Review Area Schools Impacted by Housing Growth:</b>			OTG Capacity	Current 2013/14	Year 1 2014/15	Year 2 2015/16	Year 3 2016/17	Year 4 2017/18	Year 5 2018/19	Year 6 2019/20	Year 7 2020/21	Year 8 2021/22	Year 9 2022/23	Year 10 2023/24	Year 11 2024/25	Year 12 2025/26	Year 13 2026/27	Year 14 2027/28	Year 15 2028/29			Number of Temp. Facilities
C1																						
C2																						
C3																						
C4																						
C5																						
C6																						
C7																						
C8																						
<b>Totals</b>			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
<b>Total Available Pupil Spaces to Accommodate Growth</b>				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0
<b>D Requirements of New Development for High Growth Areas (Cumulative):</b>					5	14	21	30	48	75	99	125	154	184	219	250	287	323	360			
<b>E Less: Available Pupil Places to Accommodate Growth</b>																						0
<b>F Equals: Net growth-related Pupil Place Requirements</b>																						360
<b>Description of Growth-related Need:</b>																						
<b>Growth-related Net Education Lands Costs</b>			Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs					
1 To be accommodated in existing facilities					360																	
2																						
3																						
4																						
5																						

## 7.6 EDC Accounts

Section 7(5) of O.Reg. 20/98 (as amended by 473/98 and O.Reg. 193/10) states that

“The Board shall estimate the balance of the education development charge reserve fund, if any, relating to the area in which the charges are to be imposed. The estimate shall be an estimate of the balance immediately before the day the board intends to have the by-law come into force.”

“The Board shall adjust the net education land cost with respect to any balance estimated. If the balance is positive, the balance shall be subtracted from the cost. If the balance is negative, the balance shall be converted to a positive number and added to the cost.”

Table 7-3 summarizes the EDC account collections to April 2014 for the HWDSB. The collections cover the period which corresponds to implementation of the existing 2009 EDC by-law to the aforementioned reconciliation date and includes collections from residential development, as well as any proceeds from the disposition of surplus properties (i.e., to the extent that the disposed of site was previously funded through education development charges), any interest earned on the account to date, any interest expense on account deficits to date and any refunds or overpayments during this time period.

**TABLE 7-3**  
**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD**  
**ACCOUNT RECONCILIATION – REVENUE**  
**EDC Collection Period – June 22, 2013 to April, 2014**

	Column 1	2	3	4	5	6
	Collections by Year	EDC's from Residential Development	EDC's from Residential Development	Plus: Interest Earned	Less: Refunds and Overpayments/ Adjustments including Interest	Net Collections
1	2012-13	\$ 240,240	\$ 23,352	\$ -		\$ 263,592
2	2013-14 - September 2013 to April 2014	\$ 1,231,740	\$ 138,288			\$ 1,370,027
	<b>Total Revenues</b>					<b>\$ 1,633,619</b>

Section 7(5) of O.Reg 20/98 requires that a board estimate the EDC account collections and eligible expenditures on the day immediately before the day the board intends to have the new by-law come into force. This “estimate” is typically undertaken several months in advance of the implementation of the new by-law. The EDC account reconciliation undertaken herein, dates back to the original EDC by-law in order to ensure that “actual,” rather than “estimated” revenues and expenditures have been taken into account on a go forward basis.

Table 7-4 calculates the “estimated” EDC account balance as of August 29, 2014 which is the day before the in-force date of the proposed by-law. Given that the Board adopted an initial EDC By-law at the end of June 2013, the estimate of revenue for the May 2014 to August 2014 is based on collections from January to April 2014 being averaged and used as a proxy for the May to August 2014 period.

Table 7-4 also determines the eligible EDC expenditures for the Board and details site acquisition costs, “net” site preparation and development costs, study costs, and interest costs. Finally, the portion of the expenditures eligible to be funded through education development charges is shown and a cumulative EDC account balance is determined. There is an account deficit in the order of (\$2,674,328). It is noted that any additional costs related to these EDC eligible sites, and expended after the account reconciliation undertaken as of May 26, 2014, will be included in the reconciliation of the next EDC by-law.

**TABLE 7-4**  
**Hamilton-Wentworth District School Board**  
**EDUCATION DEVELOPMENT CHARGE BY-LAW**  
**EDC Account Reconciliation - Revenues less Expenditures**  
**EDC By-law Period - June 22, 2013 to August 29, 2014 (Date before Proposed By-law Implementation Date)**

1	EDC Account Balance as at June 22, 2013 (Start of Initial By-law)									\$0
2	Collections : EDC Account Net Collections as at April 30, 2014 (including accrued interest)									\$1,633,619
3	Estimated EDC Account Collections May 1, 2014 to August 29, 2014 (including accrued interest)									\$788,644
4	Total Estimated EDC Account Collections as Proposed By-law Implementation									\$2,422,263
EDC Expenditure to Date:										
	Expenditures	Year Site Acquired	Site Size in acres	Site Acquisition Costs	Site Preparation Costs	Total Costs Incurred	Non- Growth Related Share of Expenditure	Growth-related Share of Expenditure	Eligible to be financed from Existing EDC Account	EDC Account Balance
	Tiffany Hills, Ancaster (Formerly Ancaster 2017 Acq)	2013	6.24	\$4,863,638	\$56,974	\$4,920,612	0.0%	100.0%	\$4,920,612	-\$2,498,349
	Study Costs								\$147,479	-\$2,645,828
	Interest Costs								\$28,500	-\$2,674,328
	Totals			\$4,863,638	\$56,974	\$4,920,612			\$5,096,591	-\$2,674,328
Estimated EDC Account Surplus (Deficit) as at Proposed By-law Implementation										-\$2,674,328

## 7.7 Cash Flow Analysis and Forms H1 and H2

Table 7-5 set outs a fifteen-year cashflow analysis of the proposed capital expenditure program for school sites. Immediately following this table is the Form H1 that identifies the Residential and Non-Residential EDC as reflected in Table 7-5.

The quantum of the charge is determined on the basis of an 85% residential share and 15% non-residential share for the Board. As well, a sensitivity analysis is provided, for various non-residential ratios ranging between 0% and 40%.

Where EDC collections in any given year are insufficient to cover the cost of EDC expenditures, then short term financing has been applied.

The cash flow methodology is consistent with that undertaken by school boards and municipalities and is described as follows:

### **Cash Flow Assumptions:**

- site acquisition costs are assumed to escalate by 5.0%;
- site development costs are assumed to escalate at 2% per annum;
- site acquisition costs are inflated only over the term of the by-law period (five years); site development costs escalate over the full fifteen year forecast period until the expenditures are incurred;
- the Education Development Charge account accrues 1.65% interest earnings per annum;
- all interim financing is assumed to be undertaken on a short term basis for a five-year term at a cost of 3%.

Scenario Comments:	
Hamilton-Wentworth District School Board	
BOTH PANELS	

Cashflow Assumptions	
A. EDC Account interest earnings (per annum):	1.65%
B. L/T Debenture Rate	4.00%
C. S/T Borrowing Rate	3.00%
D. L/T Debenture Term (years)	10
E. S/T Borrowing Term (years)	5

TABLE 7-5  
Hamilton-Wentworth District School Board  
Cashflow Analysis for Both Panels (Total Jurisdiction)  
Current (2014) \$

Form H2					
Type of Development (Form B/C)	Net New Units	Total ROND	Distribution Factor	Net Education Land Cost by Development Type	Differentiated Residential EDC Per Unit
Low Density	17,678	6,854	65%	\$ 33,452,833	\$ 1,892
Medium Density	15,987	2,985	28%	\$ 14,567,389	\$ 911
High Density	16,627	641	6%	\$ 3,126,742	\$ 188

Sensitivity Analysis		
Non-res Share	Res Rate	Non-Res Rate
0%	\$1,196	\$0.00
5%	\$1,137	\$0.13
10%	\$1,077	\$0.26
15%	\$1,017	\$0.39
20%	\$957	\$0.51
25%	\$897	\$0.64
40%	\$718	\$1.03

	Previously Financed 2009 By-law <sup>1</sup>	Year 1 2014/ 2015	Year 2 2015/ 2016	Year 3 2016/ 2017	Year 4 2017/ 2018	Year 5 2018/ 2019	Year 6 2019/ 2020	Year 7 2020/ 2021	Year 8 2021/ 2022	Year 9 2022/ 2023	Year 10 2023/ 2024	Year 11 2024/ 2025	Year 12 2025/ 2026	Year 13 2026/ 2027	Year 14 2027/ 2028	Year 15 2028/ 2029
Revenues:																
1 Alternative Accommodation Arrangements		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2 Operating Budget Surplus		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3 Assumed Debenture Financing		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4 S/T Borrowing Requirement		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,470,000	\$640,000	\$1,150,000	\$0	\$2,960,000	\$0
5 Subtotal (1 through 4)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,470,000	\$640,000	\$1,150,000	\$0	\$2,960,000	\$0
6 EDC Revenue (Residential) 1,017 per unit		\$2,184,516	\$2,619,792	\$2,438,766	\$3,134,394	\$3,157,785	\$3,495,429	\$3,479,157	\$3,547,296	\$3,575,772	\$3,267,621	\$3,906,297	\$3,569,670	\$4,056,813	\$4,317,165	\$4,396,491
7 EDC Revenue (Non-residential) 0.39 per sq.ft		\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729	\$601,729
8 Subtotal EDC Revenue (6 + 7)		\$2,786,245	\$3,221,521	\$3,040,495	\$3,736,123	\$3,759,514	\$4,097,158	\$4,080,886	\$4,149,025	\$4,177,501	\$3,869,350	\$4,508,026	\$4,171,399	\$4,658,542	\$4,918,894	\$4,998,220
9 Total Revenue (5 + 8)		\$2,786,245	\$3,221,521	\$3,040,495	\$3,736,123	\$3,759,514	\$4,097,158	\$4,080,886	\$4,149,025	\$4,177,501	\$5,339,350	\$5,148,026	\$5,321,399	\$4,658,542	\$7,878,894	\$4,998,220
Expenditures:																
10 Site acquisition costs (escalated at 5% per annum for 5 years)		\$0	\$4,660,425	\$0	\$0	\$5,639,949	\$3,952,006	\$4,331,061	\$0	\$4,977,498	\$10,529,323	\$4,211,729	\$3,583,187	\$2,665,760	\$7,489,714	\$0
11 Site preparation costs (escalated at 2% per annum to date of acquisition) <sup>2</sup>		\$0	\$0	\$0	\$585,859	\$0	\$0	\$446,836	\$442,414	\$494,545	\$0	\$500,348	\$1,275,888	\$520,562	\$451,733	\$342,794
12 Deficit Recovery		\$534,866	\$534,866	\$534,866	\$534,866	\$534,866										
13 Study Costs		\$0					\$120,000					\$120,000				\$120,000
14 Debenture Carrying Costs		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
15 Short Term Borrowing Costs		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$320,981	\$460,728	\$711,836	\$711,836	\$1,358,165
16 Total Expenditures (10 through 15)	\$0	\$534,866	\$5,195,291	\$534,866	\$1,120,725	\$6,174,815	\$4,072,006	\$4,777,897	\$442,414	\$5,472,043	\$10,529,323	\$5,153,058	\$5,319,803	\$3,898,158	\$8,653,283	\$1,820,959
Cashflow Analysis:																
17 Revenues Minus Expenditures (9 - 16)		\$2,251,379	-\$1,973,770	\$2,505,629	\$2,615,398	-\$2,415,301	\$25,152	-\$697,011	\$3,706,611	-\$1,294,542	-\$5,189,973	-\$5,032	\$1,596	\$760,384	-\$774,389	\$3,177,261
18 Opening Balance	\$0	\$0	\$2,251,379	\$282,190	\$2,833,819	\$5,539,129	\$3,175,372	\$3,253,332	\$2,598,501	\$6,409,146	\$5,198,995	\$9,171	\$4,207	\$5,899	\$778,926	\$4,612
19 Sub total (17 + 18)	\$0	\$2,251,379	\$277,610	\$2,787,820	\$5,449,217	\$3,123,829	\$3,200,524	\$2,556,321	\$6,305,112	\$5,114,604	\$9,022	\$4,139	\$5,803	\$766,283	\$4,537	\$3,181,873
20 Interest Earnings (12 months on Sub-total)		\$0	\$4,581	\$45,999	\$89,912	\$51,543	\$52,809	\$42,179	\$104,034	\$84,391	\$149	\$68	\$96	\$12,644	\$75	\$52,501
21 Closing Balance <sup>3</sup> (19 + 20)	\$0	\$2,251,379	\$282,190	\$2,833,819	\$5,539,129	\$3,175,372	\$3,253,332	\$2,598,501	\$6,409,146	\$5,198,995	\$9,171	\$4,207	\$5,899	\$778,926	\$4,612	\$3,234,374

1 Previously financed from predecessor by-law  
2 No escalation applied beyond the 15-year timeframe.  
3 Includes any EDC Account surplus/deficit accruing from the Board's existing EDC by-law.

Total L/T debt issued: \$0  
Total short term borrowing: \$6,220,000  
Total debenture payments (current \$): \$6,790,827  
Residual debt payment as of end of forecast period: \$3,227,281  
Year in which outstanding debt is fully funded: 2032





## Explanation of the Cash Flow Analysis:

### A. Revenues

- Line 1 incorporates any offsetting reduction to the charge resulting from alternative accommodation arrangements the Board has entered into, or proposes to enter into.
- Line 2 incorporates any operating budget surplus that the Board has designated for site acquisition purposes.
- Line 3 incorporates the long term (ten-year term) debenture requirements.
- Line 4 incorporates the short term borrowing requirement. Lines 3 and 4 involve an iterative process wherein interim financing is incorporated in order to ensure that the “closing balance” on Line 22 is positive in each year and that there is sufficient residual at the end of 15 years to pay off the outstanding residual debt.
- Line 5 subtotals lines 1 through 4.
- Line 6 determines the EDC revenue to be generated by residential building permits to be issued over the forecast period.
- Line 7 determines the EDC revenue to be generated by non-residential building permits to be issued over the forecast period.
- Line 8 subtotals the residential EDC revenue (Line 6) and the non-residential EDC revenue (Line 7).
- Line 9 totals all anticipated revenue sources (Lines 5 and 8).

### B. Expenditures

- Line 10 brings forward into the calculation the annual site acquisition costs. The timing of the capital expenditures generally determines the point at which the escalation factor of 5.0% per annum is applied.
- Line 11 incorporates the site preparation/development costs, and escalates these costs at 2% per annum.
- Line 12 calculates the expected recovery, if applicable, of the current deficit, distributed equally over the first 5 years of the forecast period.
- Line 13 incorporates the study costs specified under section 257.53(2) at the beginning of each new by-law period, and over the 15-year forecast period.

- Line 14 calculates the debenture carrying costs where longer term financing is appropriate. A 4% interest rate is assumed over the 10 year financing period. Interest is accrued beginning in the year following the issuance of the debt.
- Line 15 calculates the short term borrowing costs. An interest rate of 3% has been assumed over a five year term of borrowing. These borrowing costs include the repayment of the principal and interest
- Line 16 calculates total anticipated expenditures by totaling Lines 10 through 15.

C. Cash Flow Analysis

- Line 17 calculates total revenues minus total expenditures (Line 9 minus Line 16).
- Line 18 extracts the “closing balance” from the previous year and describes it as the “opening balance.”
- Line 19 calculates a sub-total of Lines 17 and 18.
- Line 20 accrues EDC account interest earnings at 1.65% on the sub-total (Line 20).
- Line 21 is the “closing balance” (Line 19 plus Line 20).

## 7.8 Non-Residential Share

One of the key policy decisions to be made by the Board in advance of adopting the by-law, is the percentage of net education land costs to be recovered from residential and non-residential development (or residential only).

The attribution of net education capital costs to residential development only to determine the education development charge per unit was based on the residential/non-residential share underlying the Board’s existing EDC by-law (i.e., 85% residential and 15% non-residential share). However, it is noted that the determination of the EDC charge based on any assumed share of non-statutory exempt residential development over the term of the by-law, and any proportionate share from non-residential (industrial, institutional and commercial) development, does not prejudice the Board’s final policy decision on this matter.

A sensitivity analysis outlining a range of possible residential EDC rates and comparable non-residential rates is set out in the top right-hand corner of the cashflow analysis. Non-residential shares ranging from 0% to 40% are determined for this purpose.

## 7.9 Education Development Charges

Finally, Table 7-6 summarizes the calculation of the jurisdiction-wide residential and non-residential education development charges for the Board.

This information is consistent with the EDC submission, approval of which is required to be given by the Ministry of Education prior to consideration of by-law adoption.

<b>TABLE 7-6</b> <b>Hamilton-Wentworth District School Board</b> <b>CALCULATION OF RESIDENTIAL EDUCATION DEVELOPMENT CHARGE</b>	
Total Growth-Related Net Education Land Costs (over 15-year forecast period including associated financing and study costs)	\$ 60,172,899
Costs Financed in the Previous 2013 By-law	\$ -
Site Acquisition Costs	\$ 41,783,101
Land Escalation Costs	\$ 10,257,551
Site Preparation Costs	\$ 4,212,152
Site Preparation Escalation Costs	\$ 848,827
Debenture Interest Payments	\$ -
Short Term Debt Interest Payments	\$ 570,827
Study Costs	\$ 360,000
Financial Obligations/Surplus (projected EDC Account Balance as of July 1, 2014)	\$ (2,674,328)
Interest Earnings	\$ 540,980
Closing Account Balance <sup>1</sup>	\$ 3,234,374
Total Net New Units	50,292
Total Non-Residential, Non-Exempt Board-Determined GFA	23,432,152
Residential Education Development Charge Per Unit based on 100% of Total Growth-Related Net Education Land Costs	\$ 1,017
Non-Residential Education Development Charge Per Sq. Ft. of GFA based on 0% of Total Growth-Related Net Education Land Costs	\$ 0.39

[1] Reflects the EDC account balance in Year 15 (2028/29) which would be required to fund the residual debt requirement of \$3,227,281 for the Board.

## **Appendix A – Hamilton-Wentworth District School Board – Draft EDC By-law**



## HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD

### EDUCATION DEVELOPMENT CHARGES BY-LAW NO. \*\*\*

A by-law for the imposition of education development charges in the City of Hamilton

#### WHEREAS

1. Section 257.54(1) of Division E of the *Education Act* (the “Act”) enables a district school board to pass by-laws for the imposition of education development charges against land undergoing residential and non-residential development if there is residential development in its area of jurisdiction that would increase education land costs.
2. The Hamilton-Wentworth District School Board (the “Board”) has determined that the residential development of land to which this by-law applies increases education land costs.
3. The Board has referred its estimates of the total number of new elementary and secondary pupils and its estimates of the number of elementary and secondary school sites used to determine the net education land costs to the Minister of Education for approval, and such approval was given on [DATE] in accordance with section 10 of Ontario Regulation 20/98.
4. The Board has conducted a review of its education development charge policies and held a public meeting on [DATE] with notice issued in accordance with section 257.60 of the Act.
5. The Board has given notice and held public meetings on [DATE] and [DATE], in accordance with section 257.63(1) of the Act and permitted any person who attended the public meeting to make representations in respect of the proposed education development charges.
6. The Board has determined in accordance with section 257.63(3) of the Act that no additional public meeting is necessary in respect of this by-law.

NOW THEREFORE THE HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD HEREBY ENACTS AS  
FOLLOWS:

## **PART 1 APPLICATION**

### **Defined Terms**

1. In this by-law,

- (a) “Act” means the *Education Act*, R.S.O. 1990 c. E2, as amended from time to time;
- (b) “agricultural building” means a building or structure located on an agricultural property which is necessary or ancillary to an active farm or agricultural operation including barns, tool sheds and silos and other farm related structures for such purposes as sheltering of farm related machinery and equipment used as part of a bona fide farming or agricultural operation but shall not include:
  - i. a dwelling unit or other structure used for residential accommodation; or,
  - ii. any buildings or parts thereof used for other commercial, agri-touristic, industrial or institutional purposes qualifying as non-residential development;
- (c) “Board” means the Hamilton-Wentworth District School Board;
- (d) “development” includes redevelopment;
- (e) “dwelling unit” means a room or suite of rooms used, or designed or intended for use by one person or persons living together in which culinary and sanitary facilities are provided for the exclusive use of such person or persons, and shall include, but is not limited to, a dwelling unit or units in an apartment, group home, mobile home, duplex, triplex, semi-detached dwelling, row house, single detached dwelling, stacked townhouse and townhouse;
- (f) “education land costs” means costs incurred or proposed to be incurred by the Board,
  - (i) To acquire land or an interest in land, including a leasehold interest, to be used by the Board to provide pupil accommodation;
  - (ii) To provide services to the land or otherwise prepare the site so that a building or buildings may be built on the land to provide pupil accommodation;
  - (iii) To prepare and distribute education development charge background studies as required under the Act;
  - (iv) As interest on money borrowed to pay for costs described in paragraphs (i) and (ii); or
  - (v) To undertake studies in connection with an acquisition referred to in paragraph (i).

- (g) “education development charge” means charges imposed pursuant to this by-law in accordance with the Act;
- (h) “existing industrial building” means an existing building used for or in connection with,
  - (i) manufacturing, producing, processing, storing or distributing something,
  - (ii) research or development in connection with manufacturing, producing or processing something,
  - (iii) retail sales by a manufacturer, producer or processor of something they manufactured, produced or processed, if the retail sales are at the site where the manufacturing, production or processing takes place,
  - (iv) office or administrative purposes, if they are,
    - (A) carried out with respect to manufacturing, producing, processing, storage or distribution of something, or
    - (B) attached to the building or structure used for that manufacturing, producing, processing, storage or distribution;
- (i) “gross floor area” means the total floor area, measured between the outside of exterior walls or between the outside of exterior walls and the centre line of party walls dividing the building from another building, of all floors above the average level of finished ground adjoining the building at its exterior walls and, for the purpose of this definition, the non-residential portion of a mixed-use building is deemed to include one-half of any area common to the residential and non-residential portions of such mixed-use building or structure;
- (j) “local board” means a local board as defined in the *Municipal Affairs Act*, R.S.O. 1990, c. M.46, other than a district school board defined in section 257.53(1) of the Act;
- (k) “mixed use” means land, buildings or structures used, or designed or intended for use, for a combination of non-residential and residential uses, regardless of zoning designation;
- (l) “municipality” means the City of Hamilton constituted under the *City of Hamilton Act*, 1999 S.O. 1999 c.14 Schedule C.

- (m) “non-residential use” means lands, buildings or structures or portions thereof used, or designed or intended for all uses other than residential use, and includes, but is not limited to, an office, retail, industrial or institutional use;
- (n) “Regulation” means Ontario Regulation 20/98, as amended, made under the Act;
- (o) “residential use” means lands, buildings or structures used, or designed or intended for use as a dwelling unit or units, and shall include a residential use accessory to a non-residential use and the residential component of a mixed use or of an agricultural use.

2. Unless otherwise expressly provided in this by-law, the definitions contained in the Act or the Regulation shall have the same meanings in this by-law.

3. In this by-law where reference is made to a statute, a section of a statute, or a regulation, such reference shall be deemed to be a reference to any successor statute, section or regulation.

#### **Jurisdiction**

- 4.
- (a) Subject to section 4(b), this by-law applies to all lands in the geographic limits of the City of Hamilton;
  - (b) This by-law shall not apply to lands that are owned by and are used for the purpose of:
    - (i) the municipality or a local board thereof;
    - (ii) a district school board;
    - (iii) a public hospital receiving aid under the *Public Hospitals Act* R.S.O. 1990, c. P.40;
    - (iv) a university, community college or a college of applied arts and technology established under the *Ontario Colleges of Applied Arts and Technology Act 2002*, S.O. 2002 c.8 Schedule F or a predecessor statute;
    - (v) Metrolinx, or a predecessor or successor corporation identified under the *Metrolinx Act, 2006* S.O. 2006, c.16 as amended from time to time (“GO Transit”);
    - (vi) every place of worship that is used primarily as a place of public worship and land used in connection therewith, and every churchyard, cemetery or burial site, if they are exempt from taxation under section 3 of the *Assessment Act*; and.
    - (vii) non-residential agricultural buildings.

## PART II

### EDUCATION DEVELOPMENT CHARGES

5. Subject to the provisions of this by-law, the Board hereby designates all categories of residential development and non-residential development and all residential and non-residential uses of land, buildings or structures as those upon which education development charges shall be imposed.

#### Residential Education Development Charges—Qualifying Development

6. (1) In accordance with the Act and this by-law, and subject to sections 8 and 9, the Board hereby imposes an education development charge against land undergoing residential development or redevelopment in the area of the by-law if the residential development or redevelopment requires any one of the following actions:

- (a) the passing of a zoning by-law or of an amendment to a zoning by-law under section 34 of the *Planning Act*;
- (b) the approval of a minor variance under section 45 of the *Planning Act*;
- (c) A conveyance of land to which a by-law passed under subsection 50(7) of the *Planning Act* applies;
- (d) the approval of a plan of subdivision under section 51 of the *Planning Act*;
- (e) a consent under section 53 of the *Planning Act*;
- (f) the approval of a description under section 50 of the *Condominium Act*; or
- (g) the issuing of a permit under the *Building Code Act, 1998* in relation to a building or structure,

where the first building permit issued in relation to a building or structure for below ground or above ground construction is issued on or after the date the by-law comes into force.

(2) In respect of a particular development or redevelopment an education development charge will be collected once, but this does not prevent the application of this by-law to future development or redevelopment on the same property. For greater certainty, an education development charge will be imposed on any additional dwelling unit to be built on the property that is not exempted under sections 8 and 9 of this by-law, and for which an action referred to in subsection (1) is required.



### Residential Education Development Charge—Rate

7. Subject to the provisions of this by-law, the Board hereby imposes an education development charge of **\$[AMOUNT]** per dwelling unit upon the designated categories of residential development and the designated residential uses of lands, buildings, or structures, including a dwelling unit accessory to a non-residential use, and, in the case of a mixed-use building or structure, upon the dwelling units in the mixed-use building or structure.

### Residential Education Development Charges—Exemptions

8. As required by subsection 257.54(3) of the Act, an education development charge shall not be imposed with respect to:
- (a) the enlargement of an existing dwelling unit or;
  - (b) the creation of one or two additional dwelling units in existing residential buildings as prescribed in section 3 of the Regulation as follows:

NAME OF CLASS OF RESIDENTIAL BUILDING	DESCRIPTION OF CLASS OF RESIDENTIAL BUILDINGS	MAXIMUM NUMBER OF ADDITIONAL DWELLING UNITS	RESTRICTIONS
Single detached dwellings	Residential buildings, each of which contains a single dwelling unit, that are not attached to other buildings	Two	The total gross floor area of the additional dwelling unit or units must be less than or equal to the gross floor area of the dwelling unit already in the building
Semi-detached dwellings or row dwellings	Residential buildings, each of which contains a single dwelling unit, that have one or two vertical walls, but no other parts, attached to other buildings	One	The gross floor area of the additional unit must be less than or equal to the gross floor area of the dwelling or unit already in the building
Other residential buildings		One	The gross floor area of the additional dwelling unit must be less than or equal to the gross floor area of the smallest dwelling unit already in the building

9. (1) An education development charge under section 8 shall not be imposed with respect to the replacement, on the same site, of a dwelling unit that was destroyed by fire, demolition or otherwise, or that was so damaged by fire, demolition or otherwise as to render it uninhabitable.
- (2) Notwithstanding subsection (1), education development charges shall be imposed in accordance with section 8 if the building permit for the replacement dwelling unit is issued more than two years after,
- (a) the date the former dwelling unit was destroyed or became uninhabitable; or
  - (b) if the former dwelling unit was demolished pursuant to a demolition permit issued before the former dwelling unit was destroyed or became uninhabitable, the date the demolition permit was issued.
- (3) Notwithstanding subsection (1), education development charges shall be imposed in accordance with section 8 against any dwelling unit or units on the same site in addition to the dwelling unit or units being replaced. The onus is on the applicant to produce evidence to the satisfaction of the Board, acting reasonably, to establish the number of dwelling units being replaced.
- (4) Subject to section 15, an education development charge shall be imposed under section 8 where a non-residential building or structure is replaced by or converted to, in whole or in part, a residential building or structure.

#### **Non-Residential Education Development Charges—Qualifying Development**

10. (1) In accordance with the Act and this by-law, and subject to sections 12 and 13 the Board hereby imposes an education development charge against land undergoing non-residential development or redevelopment in the area of the by-law which has the effect of increasing existing gross floor area of such development if the non-residential development or redevelopment requires any one of the following actions:
- (a) the passing of a zoning by-law or of an amendment to a zoning by-law under section 34 of the *Planning Act*;
  - (b) the approval of a minor variance under section 45 of the *Planning Act*;
  - (c) a conveyance of land to which a by-law passed under subsection 50(7) of the *Planning Act* applies;
  - (d) the approval of a plan of subdivision under section 51 of the *Planning Act*;
  - (e) a consent under section 53 of the *Planning Act*;

- (f) the approval of a description under section 50 of the *Condominium Act*; or
- (g) the issuing of a permit under the *Building Code Act, 1998* in relation to a building or structure,

where the first building permit issued in relation to a building or structure for below ground or above ground construction is issued on or after the date the by-law comes into force.

(2) In respect of a particular development or redevelopment an education development charge will be collected once, but this does not prevent the application of this by-law to future development or redevelopment on the same property. For greater certainty, an education development charge will be imposed on any additional gross floor area to be built on the property that is not exempted under sections 12 and 13 of this by-law, and for which an action referred to in subsection (1) is required.

#### **Non-residential Education Development Charges—Rate**

11. Subject to the provisions of this by-law, the Board hereby imposes an education development charge of **\$[AMOUNT]** per square foot of gross floor area of non-residential development upon the designated categories of non-residential development and the designated non-residential uses of land, buildings or structures and, in the case of a mixed use building or structure, upon the non-residential uses in the mixed-use building or structure.

#### **Non-Residential Education Development Charges—Exemptions**

12. As required by section 257.55 of the Act, if a development includes the enlargement of a gross floor area of an existing industrial building, the amount of the education development charge that is payable in respect of the enlargement is determined in accordance with the following rules:

- (a) if the gross floor area is enlarged by 50 per cent or less, the amount of the education development charge in respect of the enlargement is zero;
- (b) If the gross floor area is enlarged by more than 50 per cent, the amount of the education development charge in respect of the enlargement is the amount of the education development charge that would otherwise be payable multiplied by the fraction determined as follows:
  - (i) Determine the amount by which the enlargement exceeds 50 per cent of the gross floor area before the enlargement;
  - (ii) Divide the amount determined under paragraph 1 by the amount of the enlargement.

13.

- (a) As required by section 5 of the Regulation and, subject to paragraphs (b) and (c) below, an education development charge under section 10 shall not be imposed with respect to the replacement, on the same site, of a non-residential building that was destroyed by fire, demolition or otherwise, or that was so damaged by fire, demolition or otherwise as to render it unusable.
- (b) Notwithstanding paragraph (a), an education development charge shall be imposed in accordance with section 10 against any additional gross floor area of any non-residential development on the same site in excess of the gross floor area of the non-residential building or structure being replaced, subject to the following calculation:

If the gross floor area of the non-residential part of the replacement building exceeds the gross floor area of the non-residential part of the building being replaced, the exemption applies with respect to the portion of the education development charge calculated in accordance with the following formula:

$$\text{Exempted portion} = \frac{\text{GFA (old)}}{\text{GFA (new)}} \times \text{EDC}$$

where,

“Exempted portion” means the portion of the education development charge that the Board is required to exempt;

“GFA (old)” means the gross floor area of the non-residential part of the building being replaced;

“GFA (new)” means the gross floor area of the non-residential part of the replacement building;

“EDC” means the education development charge that would be payable in the absence of the exemption;

- (c) The exemption in paragraph (a) does not apply if the building permit for the replacement building is issued more than five years after:
  - (i) the date the former building was destroyed or became unusable; or
  - (ii) if the former building was demolished pursuant to a demolition permit issued before the former building was destroyed or became unusable, the date the demolition permit was issued.

- (d) An education development charge shall be imposed in accordance with section 11 where the residential building or structure is replaced by or converted to, in whole or in part, a non-residential building or structure;

14. The education development charge to be imposed in respect of mixed use development shall be the aggregate of the amount applicable to the residential development component and the amount applicable to the non-residential development component.

#### **Credit—Conversion**

15. This section applies where an education development charge has been paid within the preceding eighteen month period in respect of development on land and the land is being redeveloped, except where sections 8 and 9, or sections 12 and 13, as the case may be, shall apply:

- (a) The education development charge payable in respect of the redevelopment shall be calculated under this by-law;
- (b) The education development charge determined under paragraph (a) shall be reduced by a credit equivalent to the education development charge previously paid in respect of the land, provided that the credit shall not exceed the education development charge determined under paragraph (a);
- (c) Where the redevelopment applies to part of the land, the amount of the credit shall be calculated on a proportionate basis having regard to the development being displaced by the new development. By way of example, if 20% of the non-residential gross floor area of a non-residential building is being displaced by residential development through conversion, the residential education development charge on the applicable number of units shall be calculated under section 7 of the by-law, and the credit shall be the education development charge originally paid on the gross floor area being converted, subject to the limit in paragraph (b);
- (d) In no event shall the amount of the credit exceed the amount of education development charges payable hereunder.

#### **Credit—Payment by Services**

16. Subject to the requirements of the Act, the Board may by agreement permit an owner to provide land in lieu of the payment of all or any portion of an education development charge. In such event, the treasurer of the Board shall advise the treasurer of the municipality of the amount of the credit to be applied to the education development charge. In no event shall the amount of any such credit exceed the amount of education development charges payable hereunder.

### **PART III**

#### **ADMINISTRATION**



### **Payment of Education Development Charges**

17. The education development charge in respect of a development is payable to the municipality on the date that the first building permit is issued in relation to a building or structure on land to which the education development charge applies.

18. All education development charges payable shall be paid by cash, certified cheque or bank draft.

19. The Treasurer of the Board shall establish and maintain an education development charge account in accordance with the Act, the Regulation and this By-Law.

20. Withdrawals from the education development charge account established under section 19 above, shall be made in accordance with the Act, the Regulation and this By-Law.

### **Collection of Unpaid Education Development Charges**

21. In accordance with section 257.96 of the Act, section 349 of the *Municipal Act, 2001* S.O. 2001, c.25 applies with necessary modifications with respect to an education development charge or any part of it that remains unpaid after it is payable.

### **Date By-Law In Force**

22. This by-law shall come into force on [DATE]

### **Expiration**

23. This by-law shall expire on [DATE] unless it is repealed at an earlier date.

### **Severability**

24. Each of the provisions of this by-law are severable and if any provision hereof should for any reason be declared invalid by a court or tribunal, the remaining provisions shall remain in full force and effect.

### **Capital Projects**

25. Nothing in this by-law shall be construed so as to commit or require the Board to authorize or proceed with any particular capital project at any time.

### **Short Title**

26. This by-law may be cited as the Hamilton-Wentworth District School Board Education Development Charges By-law No. \*\*\*.

ENACTED AND PASSED this [DATE].

\_\_\_\_\_  
Chairperson

\_\_\_\_\_  
Director of Education and Secretary

## **Appendix B – Hamilton-Wentworth District School Board – Background Document Pertaining to a Review of the Education Development Charge Policies**



## Appendix B -- BACKGROUND DOCUMENT PERTAINING TO A REVIEW OF THE EDUCATION DEVELOPMENT CHARGE POLICIES OF THE HAMILTON-WENTWORTH DSB

The policy review document outlined herein is intended to provide the reader with an overview of the education development charge policies underlying the existing 2013 EDC by-law of the Hamilton-Wentworth District School Board (HWDSB) pursuant to Section 257.60, Division E, of the Education Act, as follows:

“Before passing an education development charge by-law, the board shall conduct a review of the education development charge policies of the board.”

Moreover, the Board is required to:

1. Ensure that adequate information is made available to the public (i.e. this document); and
2. Hold at least one public meeting, with appropriate notification of the meeting.

### B.1 HWDSB Existing EDC By-law 2013

The Hamilton-Wentworth District School Board adopted and implemented a jurisdiction-wide EDC by-law governing the entire City of Hamilton in June 2013, which was the first EDC by-law for the HWDSB under the existing legislation. The HWDSB's existing by-law was adopted on June 17, 2013 with implementation of the approved charges on June 22, 2009. The Board held two public meetings (including one to consider by-law adoption) and held stakeholder sessions as part of the 2013 EDC consultation process.

In accordance with the legislation, the HWDSB EDC by-law may be in effect for no more than 5 years. However, where there is more than one by-law governing the Board's by-law area, then the existing by-law expires on the earliest of the expiry dates of the overlapping by-laws. Since the Hamilton-Wentworth Catholic DSB by-law expires on August 30, 2014, both Boards' EDC by-laws will expire no later than August 30, 2014. As such, by-law adoption for both Boards must take place no later than Tuesday August 26, 2014.

### B.2 Overview of EDC Policies



This section of the report provides an overview of the key education development charge policy issues that will be dealt with under the Board's proposed EDC by-law. The Board of Trustees, after consideration of public input, will make decisions on the of these policy issues prior to passage of a new EDC by-law anticipated to occur on August 25, 2014.

The policy decisions to be considered by the Board of Trustees, prior to by-law adoption, are as follows:

1. What portion of the net education land costs are to be recovered from residential and non-residential (e.g. industrial, commercial and institutional) development?
2. How does the Board intend to deal with EDC account shortfalls, if any?
3. Are the charges to be applied on an area-specific or jurisdiction-wide basis?
4. Does the Board wish to exempt any residential or non-residential development? If so, how does the Board propose to fund the shortfall?
5. Does the Board wish to provide any demolition credits beyond that specified in the legislation? Does the Board wish to consider providing conversion of use credits?
6. What by-law term is proposed by the Board; five years, or something less?
7. Does the Board wish to apply surplus operating funds, if any, to reduce the charge?
8. Are there any possible accommodation arrangements with private or public sector agencies that would effectively reduce the charge?
9. If there are substantive amendments to the calculated charge as a result of stakeholder input prior to by-law passage, is there a need to conduct any further public meetings?

Policy discussions and decisions that are specific to the Hamilton-Wentworth DSB might also include:

1. Whether to consider differentiated residential EDC rates based on size of dwelling units, consistent with City of Hamilton DC by-laws;
2. Any additional by-law exemptions;
3. Aligning by-law definitions with the City of Hamilton where appropriate.

## **B.2.1 Percentage of Growth-Related Net Education Land Costs to be borne through EDCs**

### **Legislative Provisions:**

O.Reg. 20/98 section 7 paragraphs 9 (iii) and 10 (vi) restrict a board to a maximum of 100% recovery of the “net” growth-related education land costs from residential and non-residential development.

Under the existing capital funding model, education development charges are the only revenue source available to fund growth-related site acquisition and development costs where a school board qualifies to impose education development charges. However, in deriving “net” growth-related education land costs, there are several impediments to full cost recovery:

- non-statutory exemptions granted by a school board, restrict full cost recovery;
- the cost to provide land for pupils generated by statutorily-exempt residential development has no funding source;
- there are restrictions on the number of acres of land that a board can fund through an EDC by-law, which in turn results in less flexibility to the board in accommodating “peak” enrolment needs;
- the determination of growth-related site needs is based on On-the-Ground (OTG) capacity which is an assessment of classroom loading, which may not be the functional capacity of classroom use from a program perspective.

All Boards with EDC by-laws in place, have calculated their EDC rates to derive 100% cost recovery of the “net” education land costs, however, some have reduced this level by granting at least some limited non-statutory exemptions (i.e., primarily non-residential exemptions), through negotiations with development community interests, and in response to policy positions put forth by the jurisdictional municipalities and other interested stakeholders.

### **Considerations:**

One of the most significant considerations in the legislative treatment of education development charges is that there is no tax-based funding source to make up the shortfall where full cost recovery is not achieved. Most EDC legal practitioners are of the opinion that the granting of non-statutory exemptions during by-law

adoption forces the board to absorb the loss of revenue associated with granting the exemptions. Many of the revenue sources under the existing education capital funding model are “enveloped” and are therefore not available to be used for purposes other than that for which they were legislatively intended. However, from a practical perspective, there is no mechanism in the legislation to account for non-statutory exemptions, moving from one by-law period to another.

The 2013 EDC by-law of the Hamilton-Wentworth DSB recovers net education land costs from residential development (85%) and non-residential development (15%) within the City of Hamilton. No areas are exempted from the charge in the by-law. Only statutorily-exempt *residential* uses have been exempted from the imposition of education development charges in the City of Hamilton. Only statutorily-exempt *non-residential* uses have been exempted from the imposition of education development charges, with the exception of non-residential agricultural buildings. Therefore, the existing EDC by-law is designed to recover as much of the net education land cost needs as the legislation will allow.

## B.2.2 Mitigating EDC Account Deficits

A deficit in the EDC account is one of two eligibility triggers prescribed in section 10 of O.reg 20/98. If a board cannot demonstrate that it has 5-year projected enrolment exceeding capacity, on the, the elementary or the secondary panel; then the only means of qualifying for a successor EDC by-law is by having a deficit in the EDC account. However, a significant EDC account shortfall can impact on a school board’s ability to manage capital funding priorities.

EDC expenditures reflect the need to acquire and prepare land to accommodate enrolment growth due to housing development. However, the Regulation requires that the charge be spread over the “number of new dwelling units in the area in which charges are to be imposed for the 15 years immediately following the day the board intends to have the by-law come into force. The board’s estimate shall only include new dwelling units in respect of which education development charges may be imposed.” In DC and EDC parlance, this means the charge is spread across all greenfields housing development for which new school sites may be required, as well as all infill development for which there may be no growth-related site needs.

Based on the consultants’ extensive knowledge of the legislation, we believe that there are alternative means of dealing with a deficit in an EDC account, including:

1. Accelerate the deficit recovery earlier in the cashflow analysis;

2. Spread the deficit across the 15-year cashflow period, in years where site acquisition costs are limited or are 'zero' (in order to mitigate the increase in the rates as a result of deficit recovery);
3. Undertake more frequent by-law amendment or by-law adoption processes, in order to recognize higher site acquisition or site development costs, and projected revenue streams against actual;
4. Phase-in any increases to the charge and monitor the balance in the account on an annual basis to determine the level of imposed rates necessary to ensure that revenues do not exceed expenditure needs.

Most of the existing in-force EDC by-laws have provisions requiring board staff to report to the Board prior to the annual anniversary of by-law inception. While this process allows a board to make up any shortfall since the last amendment or by-law renewal, it does nothing to resolve long-standing shortfalls in the EDC account.

Where any of the foregoing approaches determine an EDC charge greater than the current in-force rates, then the board could consider a phase-in of the rates, by considering future expenditure timing and the need to ensure that the funds are available in the account when required.

Finally, we are of the opinion that the approach taken by the co-terminous Hamilton boards to mitigate any deficit shortfall does not have to be the same. In other words, the approach taken by a board with a smaller deficit may differ from an EDC board who is dealing with a substantial deficit.

### **B.2.3 Jurisdiction-wide vs. Area Municipal (or Sub-area) Charges**

#### **Existing EDC By-law Provisions:**

The existing 'in force' EDC by-laws are applied on a City-wide (and jurisdiction-wide) uniform basis. The rationale for this decision is primarily based on the premise that:

1. A jurisdiction-wide approach is more consistent with the way in which education services are provided by school boards;
2. Uniform application of education development charges is more congruent with the education funding model as a whole;
3. Money from an education development charges account may be used only for growth-related net education land costs attributed to or resulting from development in the area to which the education development charge by-law applies (section 16 of O.Reg 20/98). Therefore monies collected in one by-law area could not be spent outside of that by-law area (without the permission of the Minister of Education) and this is particularly problematic given school choice at the secondary level.

### **Legislative Provisions:**

Section 257.54 sub section (4) allows for area specific EDC by-laws by providing that “an education development charge by-law may apply to the entire area of jurisdiction of a board or only part of it.”

Further, the *Education Act* permits a board to have more than one EDC by-law under section 257.54 subsection (1) in that “If there is residential development in the area of jurisdiction of a board that would increase education land costs, the board may pass by-laws for the imposition of education development charges against land in its area of jurisdiction undergoing residential or non-residential development.”

Finally, section 257.59(c) of the *Education Act* requires that “an education development charge by-law shall.....designate those areas in which an education development charge shall be imposed”.

### **Considerations:**

Under the Regulatory framework, a board must establish a separate EDC account for each by-law that it enacts (and therefore each by-law area) and may only use the funds to pay for growth-related net education land costs (and the other “eligible” land costs defined under the Act) in that area (which may comprise a region of a board as defined under O.Reg. 20/98). The entire approach outlined in the legislation, and governing the determination of education development charges, requires that the calculation of the charge, the preparation of background studies, the establishment of EDC accounts and the expenditure of those funds, etc., is to be done on an individual by-law basis.

From a methodological perspective, an EDC-eligible board is required to make assumptions respecting the geographic structure of the by-law or by-laws from the onset of the calculation process. Discussions respecting the number of potential by-laws and the subdivision of the Board’s jurisdictions into review areas are held with the Board at the commencement of the study process. If, as a result of the consultation process undertaken in contemplation of the adoption of an EDC by-law or by-laws, the Board chooses a different policy direction, it is usually advised by legal counsel that a new background study is required, and the calculation/public consultation process begins anew.

Several of the key considerations in assessing the appropriateness of area specific versus uniform application of education development charges are as follows:

- The use of a uniform jurisdiction-wide EDC is consistent with the approach used to fund education costs under the Provincial funding model (i.e., the same per pupil funding throughout the Province), with a single tax rate for residential development (throughout the Province) and uniform region-wide



tax rates for non-residential development (by type), and is consistent with the approach taken by the Board to make decisions with respect to capital expenditures;

- Uniform by-law structures are more consistent with the implementation of a board's capital program (i.e., school facilities where and when needed) and are more consistent with board philosophies of equal access to all school facilities for pupils;
- School attendance boundaries have, and will continue to shift over time, as boards deal with a dynamic accommodation environment and the need to make efficient use of limited capital resources, particularly given that they are dealing with ageing infrastructure, demographic shifts and continually changing curriculum and program requirements;
- Where the pace of housing development generates the need for a school site over a longer period of time, there is a need to temporarily house pupils in alternate accommodation; which consumes the asset lifecycle of the "hosting" facility, even if pupils are accommodated in portable structures;
- District school boards have a statutory obligation to accommodate all resident pupils and as such, pay less attention to municipal boundaries as the basis for determining by-law structure;
- A board must establish a separate EDC account for the by-law and may only use the funds to pay for growth-related net education land costs in that by-law area (unless the Minister of Education approves a redirection of funds);
- In a situation where pupils are accommodated in a by-law area other than their place of residence, there is the potential for stranded funds and the *Education Act* does not address this type of circumstance.
- Jurisdiction-wide application of the charge assists in minimizing the risk of less-than-full cost recovery, especially where attendance boundaries and accommodation strategies change over time.
- Where it is determined that stranding of EDC funds is not likely to occur over the by-law term, and an area specific by-law is adopted by the board, careful monitoring would be required on an on-going basis to ensure that the board does not subsequently find itself in a position where it was unable to fully fund growth-related site needs over the longer term. Where this situation has the potential to occur, a new by-law structure should be considered by the board as soon as possible, because there is no ability to make up the funding shortfall once building permits are issued;

- The ability to utilize EDC funds for capital borrowing purposes under an area specific by-law scheme is limited to borrowing for cash flow purposes only (i.e., revenue shortfalls), due to the inability, under the existing legislation, to recover net education land costs sufficient to repay the “borrowed” area;
- Multiple EDC accounts under a multiple by-law approach restrict the flexibility required to match the timing and location of site needs to available revenue sources and may compromise the timing of new school construction and increase financing costs;
- Multiple by-laws can give consideration to different patterns and levels of development (including composition of dwelling units) in that they incorporate variable rates throughout the region. The appropriateness of utilizing area specific by-laws to reflect economic diversity within a jurisdiction, should, however, be measured in the context of measurable potential market or development impact;
- The precedent for levying uniform municipal development charges for “soft services” (e.g., recreation, library) is well established, and is currently used in existing DC by-laws by virtually all municipalities. As well, infill dwelling units pay the same development charge for these services as new units in the major growth areas, despite the availability of existing facilities;
- While today there are few area specific EDC by-laws in the Province of Ontario, those that have been adopted or proposed, reflect areas where there is little or no expectation of cross-boundary attendance.

## B.2.4 Non-Statutory Residential Exemptions

### Legislative Provisions:

Under the legislation, residential statutory exemptions include:

- The enlargement of an existing dwelling unit (s.257.54(3)(a)).
- The addition of one or two units to an existing residential building where the addition is within prescribed limits (s.257.54(3)(b), O.Reg. 20/98 s.3).
- The replacement dwelling on the same site as a dwelling unit that was destroyed (or rendered uninhabitable) by fire, demolition or otherwise, where the building permit for the replacement dwelling is issued two years or less after the later of the date on which the former dwelling unit was destroyed or became uninhabitable, or a demolition permit was issued (O.Reg. 20/98 Section (4)).

In addition, Part III, s.7.1 of O.Reg. 20/98 provides that, “The board shall estimate the number of new dwelling units in the area in which the charges are to be imposed for the of the 15 years immediately following the day the board intends to have the by-law come into force. The board’s estimate shall include only new dwelling units in respect of which education development charges may be imposed.”

Accordingly, any costs related to students generated from units which are statutorily exempt (i.e. housing intensification) are not recoverable from EDCs.

Finally, an amendment to O.Reg. 20/98 enables a board to vary the EDC rates to consider differences in size (e.g. number of bedrooms, square footage) of dwelling units or occupancy (permanent or seasonal, non-family households or family households) although the latter (i.e. occupancy) could change over time.

Section 7 paragraph (9) of O.Reg. 20/98 states that, “the board shall determine charges on residential development subject to the following,

- i) the charges shall be expressed as a rate per new dwelling unit,
- ii) the rate shall be the same throughout the area in which charges are to be imposed under the by-law, ...”

Despite this, a board may impose different charges on different types of residential development, based on the percentage of the growth-related net education land costs to be applied to residential development that is to be funded by the type. The restrictions noted above would also apply in the case of differentiated residential EDC rates.

### **Considerations:**

Some types of units may initially generate limited (if any) pupils (e.g., bungalow townhouses, small apartments, adult lifestyle, recreational units), although "need for service" is not a requirement of education development charges under Division E of the *Education Act*. There is precedent to levy education costs on these types of units, since residential taxpayers contribute to education costs whether or not they use education services. Further, there is no legislative ability under the *Building Code Act* to restrict the number of occupants in a dwelling unit at the time of initial occupancy, or subsequent re-occupation. Bill 140, which came into force on January 1, 2012, requires that all municipalities allow basement apartments, or secondary

units, in residential detached, semi-detached and townhouse units. This legislation would allow for increased school-aged population per dwelling unit.

There would appear to be two options under the EDC legislation for dealing with variations in school age population per household, over time.

The first alternative is to provide an exemption for a particular type of dwelling unit. However, any exempt category must be definable such that a reasonable 15-year projection can be made, and a physical description can be included in the EDC by-law, such that building officials can readily define exempt units (e.g., seniors' housing receiving Provincial assistance would be definable, whereas market housing being marketed to seniors would be very difficult to project and define, since it could be claimed by any development). Also, occupancy status could change over time. In addition, school boards deal with a variety of municipal zoning definitions within their jurisdiction and it is extremely difficult to be consistent with all municipal DC by-law implementation practices concurrently.

The second alternative would be to differentiate the residential charge by type in order to establish a lower EDC rate for dwelling units that would typically be occupied by fewer school age children per household. However, the same unit type (e.g., single detached), with the same number of bedrooms, or square footage, could exhibit vastly different school age occupancies. The same difficulties prevail in trying to define a unit type that segregates various levels of school occupancy that is definable and can be easily implemented under by-law application. It is noted that several municipal DC by-laws give regard to variations in occupancy due to size (i.e. square footage). There is nothing in the legislation that would prohibit a similar analysis for EDCs. Regardless of which approach is taken, there is no legislative ability to restrict the level of occupancy, and occupancy status could change over time.

However, even where the policy decision is not to differentiate the residential charge, the projections of enrolment are usually designed to consider the lower pupil generation of these units, which is applied to the number of units in the dwelling unit forecast expected to be non-children households. Therefore, non-differentiated residential rates represent averages for all types of units which give consideration to the variation in school age population per household.

**City of Hamilton City-Wide Development Charge By-law - Residential Exemptions (as of June 23, 2009 (as amended)):**

The City of Hamilton DC by-laws impose development charges against single and semi-detached units, apartments with 2 bedrooms or more, bachelor and 1 bedroom apartments, and special care/special dwelling units (which does not appear to be defined in the City's by-law).

Further, the area municipal DC by-laws within the City of Hamilton exempt the following non-statutory residential developments:

- a) Any affordable housing project that is approved to receive funding from a senior level of government affordable housing program or an approved City of Hamilton or City Housing Hamilton Corporation affordable housing programme, providing the development charge liabilities of the affordable housing project are not eligible for funding by senior levels of government;
- b) Temporary residential buildings or structures remaining on the land for less than one (1) year;
- c) All residential development within the boundaries of the Downtown Hamilton Community Improvement Project Area (CIPA), up to 90% of the DC charge (except where dollar-for-dollar voluntary contributions are made to a Downtown Public Art Reserve).

**B.2.5 Non-Statutory Non-residential Exemptions**

**Legislative Provisions:**

Non-residential statutory exemptions include:

- land owned by, and used for the purposes of, a board or a municipality
- expansions to industrial buildings (gross floor area)
- replacement, on the same site, of a non-residential building that was destroyed by fire, demolition or otherwise, so as to render it unusable and provided that the building permit for the replacement building was issued less than 5 years after the date the building became unusable or the date the demolition permit was issued

Section 7 paragraph (10) of O.Reg. 20/98 states that “if charges are to be imposed on non-residential development ... the charges shall be expressed as ...”

- a) a rate to be applied to the board-determined gross floor area of the development, or



- b) a rate to be applied to the declared value of the development.

### **Considerations:**

If a board elects not to have a non-residential charge, then non-statutory non-residential exemptions is not an issue.

However, there is no funding source currently available under the new funding model to absorb the cost of providing non-statutory exemptions. In addition, by-law administration and collection of the charge, and the ability to treat all development applications in a fair and equitable manner, are complicated by the granting of non-statutory exemptions.

A 2007 legal opinion, sought on this matter by the consultant, suggests that a school board must absorb the cost of exemptions voluntarily granted by the board to any non-statutory non-residential development (i.e., the board would not be in a position to make up the lost revenue by increasing the charge on the other non-exempt non-residential development under the legislation). However, from a technical perspective, there is no provision in the legislation to account for a board's decision to grant non-statutory exemptions. The same is true for municipal DCs, however, several municipalities have recently taken steps to estimate the value of non-statutory exemptions and add this value to the DC reserve fund, in determining the opening balance related to the successor by-law.

### **Existing EDC By-law Provisions:**

The HWDSB and the HWCDSB existing "in-force" EDC by-laws apply to both residential and non-residential development. The non-statutory, non-residential development exempted from the payment of EDCs is non-residential agricultural buildings and structures, places of worship, and land used in connection therewith, churchyards, cemeteries and burying grounds. The HWDSB has the ability to revisit this policy decision for the 2014 by-law.

### **City of Hamilton Municipal Development Charges By-laws - Non-Residential Exemptions (as of June, 2009 (as amended)):**

The City of Hamilton DC by-law makes provision for a significant number of non-statutory non-residential developments:

- a) Parking garages or structures exclusively devoted to parking, including indoor parking lot located at grade;
- b) An agricultural use;

- c) A Place of Worship;
- d) A Covered Sports Field;
- e) A temporary building or structure remaining on the land for less than one (1) year;
- f) All residential development within the boundaries of the Downtown Hamilton Community Improvement Project Area (CIPA), up to 90% of the DC charge (except where dollar-for-dollar voluntary contributions are made to a Downtown Public Art Reserve);
- g) Partial exemptions for expansions of non-industrial gross floor area;
- h) Equivalent exemptions to offset environmental remediation costs on brownfield properties;
- i) Development by universities, non-for-profit private elementary and secondary schools and other post-secondary schools offering degrees or diplomas recognized by the Province of Ontario. These developments are required to pay the Transit DC component and are exempt from all other DC charges;
- j) Development and redevelopment of public hospitals and student residences developed by a university, college or other accredited post-secondary institution, or accredited private secondary schools are exempt from the payment of 50% of the applicable DC charge ;
- k) Redevelopment of residential facilities are exempt from the payment of 50% of the DC charge (with certain conditions);
- l) Reduced DC rates apply to new industrial developments less than 10,000 square feet in size;
- m) Adaptive reuse Protected Heritage Properties are exempted for DCs within the existing building envelope.

## B.2.6 Demolition and Conversion Credits

### Legislative Provisions:

Section 4 of O.Reg 20/98 prescribes a *replacement dwelling unit exemption*.

Section 4 states that “a board shall exempt an owner with respect to the replacement, on the same site, of a dwelling unit that was destroyed by fire, demolition or otherwise, or that was so damaged by fire, demolition or otherwise as to render it uninhabitable.”

However, “a board is not required to exempt an owner if the building permit for the replacement dwelling unit is issued more than two years after,

- a) the date the former dwelling unit was destroyed or became uninhabitable; or
- b) if the former dwelling unit was demolished pursuant to a demolition permit issued before the former dwelling unit was destroyed or became uninhabitable, the date the demolition permit was issued.”

The Board's EDC by-law incorporates a two year grace period.

Section 5 of O.Reg. 28/98 deals with exemptions for the replacement of **non-residential** buildings. Similar provisions apply with respect to the replacement of non-residential gross floor area (GFA), except that the credit is only applied to the extent that the amount of new floor space is equivalent to the GFA of the floor space being replaced. The legislative grace period for the replacement of non-residential GFA is five years.

The Board's EDC by-law incorporates a five-year grace period for non-residential buildings, consistent with the legislation.

There are no legislative provisions specifically dealing with conversion of use. However, the EDC Guidelines, section 4.1, states that, "Board by-laws may include provisions for credits for land use conversion. Typically, this situation would arise if an EDC is paid for one type of development and shortly thereafter (the period of time defined in the board's EDC by-law), the land is rezoned and a new building permit issued for redevelopment (to an alternate land use). EDC by-laws may include provisions for providing credits in this situation to take into account the EDC amount paid on the original development (generally by offsetting the EDC amount payable on the redevelopment)." The HWDSB EDC by-law provides for conversion of use credits.

## **B.2.7 Percentage of Net Education Land Costs to be borne by Residential and Non-residential Development**

### **Legislative Provisions:**

Section 257.54(1) of the *Education Act* provides that a board may pass an EDC by-law "against land in its area of jurisdiction undergoing residential or non-residential development," if residential development in the board's jurisdiction would increase education land costs.

Section 7 paragraph 8 of O.Reg. 20/98 requires that, "the board shall choose the percentage of the growth-related net education land cost that is to be funded by charges on residential development and the percentage, if any, that is to be funded by charges on non-residential development." "The percentage that is to be funded, by charges on non-residential development shall not exceed 40 percent."

A board has the choice under the *Education Act*, of levying an EDC only on residential development (for partial or full eligible cost recovery), or levying a charge on both residential and non-residential development

(up to a maximum of 40% of costs allocated to non-residential development). Under the previous DCA legislation, a charge on non-residential development (then termed “commercial” development) was required.

### **Considerations:**

For most of the current EDC by-laws, 10-15% of net growth-related education costs were funded by non-residential development. This percentage was specifically requested by a majority of the development organizations during the public consultation process, particularly where the quantum of the residential charge is higher than the norm.

There are limited options for funding education land costs under the Province’s new capital funding model. All boards eligible to impose education development charges are likely to seek full eligible cost recovery (100%) under EDCs. However, the requirement for an EDC non-residential charge is not part of the *Education Act* and therefore boards may elect to recover 100% of costs from residential development or up to 40% from non-residential development (with the remainder to be recovered from residential development).

The major *advantages* of allocating 100% of net education land costs to residential development are as follows:

- Reduction of risk to the board in not achieving full revenue recovery, as demand for new pupil places will increase directly with the level of residential growth; non-residential floor area (or building permit declared value) is difficult to forecast over 15 years (particularly on an area-specific basis), and a downturn in non-residential growth would leave the board with an EDC revenue shortfall (with no available funding sources to make up the differential other than a request for additional capital funding from the Province);
- Simplified EDC process and by-law, eliminating the need to deal with a range of requests for exemptions, and redevelopment credits;
- Establishment of a more direct linkage to the need for the service (i.e., pupils generated by new residential development) and the funding of that service, similar to municipal development charges (although not legislatively required by the *Education Act*), although it is widely accepted by planning practitioners that employment growth leads housing growth;

- The difficulties in administering/collecting even a nominal non-residential charge and interpretation of by-law applicability vis-a-vis municipal DC by-law definitions of gross floor area, zoning provisions, etc.

The major *disadvantages* of allocating 100% of net education land costs to residential development are as follows:

- Increases the residential charge;
- A downturn in residential growth due to changing economic conditions will have a negative impact on EDC cash flow and the ability to contain account deficits;
- Potential impact on the residential development market, due to a higher residential EDC bearing 100% of the net education land costs;
- May be opposed by the development community which strongly supported the 85-90% residential and 10-15% non-residential division of costs under the current EDC by-laws;
- The precedent of eliminating the non-residential charge in one by-law period may make it difficult to reverse the decision and have a non-residential charge in a subsequent by-law period;
- Eliminating the non-residential charge reduces the breadth of the board's overall EDC funding base, which may be particularly significant if there are large commercial/industrial developments in future.

## B.2.8 By-law Term

### Legislative Provisions:

The *Education Act* permits a school board to pass an EDC by-law with a maximum term of five years (s.257.58 (1)).

A board with an EDC by-law in force, may pass a new EDC by-law at any time, after preparing a new education development charge study, securing the Minister of Education's approval, and undertaking the required public process (s.257.58(2)).

A board may amend an EDC by-law once in the one-year period following by-law enactment, to do any of the following:

- “1. Increase the amount of an education development charge that will be payable in any particular case.



2. Remove, or reduce the scope of, an exemption.
3. Extend the term of the by-law.” (s.257.70(2) and subject to s.257.58(1))

A public meeting is not required for a by-law amendment; however, the board must give notice of the proposed amendment, in accordance with the regulations, and make available to the public, the EDC background study for the by-law being amended, and “sufficient information to allow the public to generally understand the proposed amendment.” (s.257.72)

### **Considerations:**

A five-year term provides the maximum flexibility since a board has the power to amend the by-law or pass a new by-law at an earlier point, if necessary. By-law amendments are necessary to ensure that cost increases or land needs increases, are properly reflected in the charge. In order to ensure that the EDC by-law process recovers 100% of the net education land costs over time, it is important to ensure that there is a continual matching of the revenue side of the EDC equation to the expenditure side.

The level of effort required to emplace a new by-law (e.g., production of an EDC background study, involvement in an extensive consultation process with the public and liaison process with municipalities) would suggest that a longer term (maximum five years) by-law is more desirable.

The HWDSB imposed its current By-law in June 2013. Its co-terminous Board, the Hamilton-Wentworth Catholic District School Board, already had a 5-year EDC By-law in place with an expiration date of August 30, 2014. Section 17 of Ontario Regulation 20/98, as amended, regarding Education Development Charges, indicates that a Board may specify any date for the expiration of an EDC By-law based on either the maximum term of the By-law being five years; however, a By-law for one school board automatically expires on the same date as an existing By-law of a co-terminous Board if the By-laws cover the same jurisdiction. As such, the HWDSB’s existing By-law expires on August 30, 2014 after being in force for slightly over 14 months.

## **B.2.9 Application of Operating Surpluses to Capital Needs**

### **Legislative Provisions:**

The education development charge background study must include “a statement from the board stating that it has reviewed its operating budget for savings that could be applied to reduce growth-related net education land costs, and the amount of any savings which it proposes to apply, if any.”

### **Considerations:**

The Regulation requires that this issue be addressed by the board.

The use of the expression, “if any,” recognizes that even if there is a surplus, the board may not choose to direct it to this particular form of expenditure.

The Provincial Funding Model prescribes “envelopes” which impact on the direction of budgetary surpluses, including the requirement that funds may not be moved from the classroom to non-classroom category; funds generated by special education needs cannot be used for other purposes; funds generated from grants for new pupil places or facilities renewal must be used for this purpose or placed in an account for future use. Only funds generated from the School Board Administration and Governance, Transportation and School Operations grants may be directed elsewhere (and therefore could be potentially used for education land costs).

The Board reviewed its existing policy and on April 28, 2014 determined that there are no surplus operating funds to offset EDC-related expenditures. A copy of the HWDSB policy is found in Appendix C.

## **B.2.10 Policy on Alternative Accommodation Arrangements**

### **Legislative Provisions:**

Information which must be included in the education development charge background study includes “A statement of the board’s policy concerning possible arrangements with municipalities, school boards or other persons or bodies in the public or private sector, including arrangements of a long-term or co-operative nature, which would provide accommodation for the new elementary school pupils and new secondary school pupils...without imposing education development charges or with a reduction in such charges.” (section 9(1) paragraph 6 of O.Reg 20/98)

For a subsequent EDC by-law period, the board is further required to provide a “statement of how the policy...was implemented and, if it was not implemented, an explanation of why it was not implemented.”

### **Considerations:**

The legislation would appear to contemplate situations where the “arrangements” include consideration for both land and buildings.

The impact on the Board’s permanent capacity (particularly in the situation of a long-term leasing arrangement) would have to be considered as part of the needs assessment inherent in the EDC calculation.

If “other persons” were to enter into these arrangements with school boards, they would be potentially spreading the benefit of the arrangement across all development, as opposed to a land owner entering into a services-in-lieu agreement that would provide the applicant with a credit against EDCs payable.

The pupil accommodation account can be utilized to enter into long and short term lease arrangements with the private sector, or to enter into multi-use partnership agreements with other school boards, municipalities or the private sector.

Section 210.1(12) of the *Municipal Act* permits school boards to provide limited exemptions from municipal and school taxes and education development charges in exchange for the provision of school capital facilities, under certain circumstances.

The Board reviewed its existing policy and on April 28, 2014 determined that it will continue to explore accommodation arrangements which may result in accommodation efficiencies; however, at this time there are no savings under this policy to offset EDC-related expenditures. A copy of the HWDSB policy is found in Appendix C.

## **B.2.11 Policy on the Requirement to Conduct Further Public Meetings**

EDC eligible boards typically undertake additional consultation with interested stakeholders beyond the required public meetings. If, as a result of the consultation process, there is a desire to recommend the adoption of an EDC rate (or rates) that is substantively different than the charge set out in the background study, or the Ministry approval process alters the charge in any way (particularly if the charge is proposed to

increase over the calculated charge) then the Board of Trustees must determine if an additional public meeting (or meetings) is required.

## **B.3 Summary of By-law Appeals, Amendments and Complaints**

### **B.3.1 Appeals**

Under Section 257.65 of the *Education Act*, “any person or organization may appeal an education development charge by-law to the Ontario Municipal Board by filing with the secretary of the board that passed the by-law, a notice of appeal setting out the objection to the by-law and the reasons supporting the objection.”

### **B.3.2 Amendments**

#### **Legislative Provisions:**

Section 257.70 subsection (1) states that “subject to subsection (2), a board may pass a by-law amending an education development charge by-law.” Subsection (2) goes on to say that, “a board may not amend an education development charge by-law so as to do any one of the following more than once in the one-year period immediately following the coming into force of the by-law or in any succeeding one year period:

1. Increase the amount of an education development charge that will be payable in any particular case.
2. Remove, or reduce the scope of, an exemption.
3. Extend the term of the by-law.”

Section 257.71 states that “A by-law amending an education development charge by-law comes into force on the fifth day after it is passed.” Finally, “before passing a by-law amending an education development charge by-law, the board shall,

- a) give notice of the proposed amendment in accordance with the regulations; and
- b) ensure that the following are made available to the public,
  - (i) the education development charge background study for the by-law being amended, and
  - (ii) sufficient information to allow the public to understand the proposed amendment.”

There have been no amendments to the existing EDC By-law.

### B.3.3 Complaints

Under Section 257.85 of the *Education Act*, “an owner, the owner’s agent or a board, may complain to the council of the municipality to which an education development charge is payable that,

- a) the amount of the education development charge was incorrectly determined;
- b) a credit is or is not available to be used against the education development charge, or that the amount of a credit was incorrectly determined;
- c) there was an error in the application of the education development charge by-law.”

In addition,

“A complaint may not be made...later than 90 days after the day the education development charge, or any part of it, is payable.”

No complaints have been filed to date with respect to the HWDSB EDC by-law.





## **APPENDIX C – Hamilton-Wentworth District School Board -- EDC Policies Re Operating Surpluses and Alternative Accommodation Arrangements**



## C.1 School Sites – Operating Budget Surplus

### School Sites – Operating Budget Surplus Policy

#### PURPOSE:

Hamilton-Wentworth District School Board (HWDSB) intends to conduct an annual review of operating budget savings that could be applied to reduce the growth related net education land costs, as per Section 9 (1) paragraph 8 of O. Reg. 20/98 of the *Education Act*.

#### GUIDING PRINCIPLES:

Where there has been or it appears that there will be a surplus in the non-classroom part of the estimates of the school board in a fiscal year, the Board shall determine on an annual basis whether all, part, or none of the surplus will be designated as available for the purpose of acquiring school sites by purchase, lease or otherwise.

#### INTENDED OUTCOMES:

The review referred to in section 9(1) paragraph 8 be conducted annually as part of the process of setting the estimates.

#### RESPONSIBILITY:

Director of Education  
Members of Executive Council

## TERMINOLOGY:

*Section 9 (1) paragraph 8 of O. Reg. 20/98:* provides that an education development charge background study must contain:

A statement from the board stating that it has reviewed its operating budget for savings that could be applied to reduce growth-related net education land costs, and the amount of any savings which it proposes to apply, if any.

## ACTION REQUIRED:

Having undertaken the steps necessary for the purposes of determining the education development charges, the board shall pass a motion substantially in the following form:

“Whereas it appears that there has been or that there will be a surplus in the non-classroom part of the budget in the amount of \$X;

Moved that:

(1) The board will designate \$Y as available for the purpose of acquiring school sites by purchase, lease or otherwise;

(2) The board’s reasons for so deciding are as follows:”

## PROGRESS INDICATORS:

Intended Outcome	Assessment
<ul style="list-style-type: none"><li>The review referred to in section 9(1) paragraph 8 be conducted annually as part of the process of setting the estimates.</li></ul>	<ul style="list-style-type: none"><li></li></ul>



## REFERENCES:

### Government Documents

Education Act

Ontario Regulation 20/98 (as amended)

### HWDSB Strategic Directions

Achievement Matters

Engagement Matters

Equity Matters

### HWDSB Policies

Alternative Arrangements for School Facilities

## School Sites and Operating Budget Directive

### **RATIONALE:**

Hamilton-Wentworth District School Board is required to conduct an annual review of operating savings that could be applied to reduce the growth related net education land costs.

### **TERMINOLOGY:**

*Growth Related Net Education Land Cost:* the cost of providing additional land (school sites and/or site development costs) required as a result of the need to accommodate students resulting from new residential development. This cost is net of any available revenues that may be applied to reduce the cost.

*Non-classroom Estimates:* Allocation for School Operations

### **PROCEDURES:**

1. Prior to finalizing the annual budget estimates, the Board shall review the operating budget for savings that could be applied to reduce growth related net education land costs. The Board shall consider applying these savings to implement a reduction in the growth related net education land cost, and consequently the education development charge that may be levied by the Board.
2. Where there has been or it appears that there will be surplus in the non-classroom part of the estimates of the Board in a fiscal year, the Board shall pass a resolution relating to this surplus. The reasons for the decision related to this surplus shall be included in the resolution or as part of the public record related to the resolution.

## C.2 Alternative Arrangements for School Facilities

### Alternative Accommodations for School Facilities Policy

#### PURPOSE:

Hamilton-Wentworth District School Board (HWDSB) will consider possible arrangements with municipalities, School Boards, or other persons or bodies in the public or private sector, including arrangements of a long-term or co-operative nature, which would provide accommodation for the new elementary school pupils and new secondary school pupils who are resident pupils of the Board, subject to the Guiding Principles.

#### GUIDING PRINCIPLES:

- The alternative accommodations must be cost effective and advantageous for HWDSB compared to other possible arrangements including an acquisition of a school site and the construction of a free standing building.
- The alternative accommodations shall comply with any guidelines issued by the Ministry of Education.
- HWDSB may enter into lease arrangements respecting school facilities intended to be used to accommodate peak enrolment, but shall not enter into such arrangements respecting school facilities that are necessary to accommodate long-term enrolment unless the arrangements could result in ownership at the Board's discretion.
- HWDSB shall retain sufficient governance authority over the facility to ensure that it is able to deliver the appropriate educational program to its pupils and to ensure that the identity, ambience and integrity of the facility are preserved.

#### INTENDED OUTCOME:

That the Alternative Accommodations for School Facilities policy is applied to all new elementary and secondary schools being contemplated by the Board.

## **RESPONSIBILITY:**

Director of Education

Members of Executive Council

## **TERMINOLOGY:**

*Cost effective: Reduce the overall capital and/or site acquisition costs associated with accommodating students resident to the HWDSB.*

*Governance authority: Responsibility and decision-making voice in the design and operation of the facility to protect the Board's ability to deliver appropriate education programs consistent with the Board's educational mandate.*

*Partnership: the purchase of adjoining sites by the Board and a second party with consideration of possible joint use of grounds and/or facilities.*

*Alternative Accommodations: Include a variety of strategies such as forward buying, option agreements, purchases, lease buy-back, site exchanges, and joint venture partnerships resulting in cost effective delivery of pupil accommodation.*

## **ACTION REQUIRED:**

HWDSB will review submissions from local municipalities, school boards or other persons or bodies in the public or private sectors who invite the Board to enter into partnerships agreements to provide alternative arrangements for school facilities.

The review will examine the merits of the proposed partnership as it relates to the Guiding Principles.

Staff will obtain Board approval for any alternative accommodation for school facilities.

## PROGRESS INDICATORS:

Intended Outcome	Assessment
<ul style="list-style-type: none"> <li>That the Alternative Accommodations for School Facilities policy is applied to all new elementary and secondary schools being contemplated by the Board</li> </ul>	<ul style="list-style-type: none"> <li>This will be assessed through the staff report seeking Board approval.</li> </ul>

## REFERENCES:

### Government Documents

Education Act

### HWDSB Strategic Directions

Achievement Matters  
Engagement Matters  
Equity Matters

### HWDSB Policies

Facility Partnership



## Alternative Accommodations for School Facilities Directive

### **RATIONALE:**

Hamilton-Wentworth District School Board (HWDSB) will consider possible arrangements with municipalities, School Boards, or other persons or bodies in the public or private sector, including arrangements of a long-term or co-operative nature, which would provide accommodation for the new elementary school pupils and new secondary school pupils who are resident pupils of the Board, subject to the Guiding Principles.

### **TERMINOLOGY:**

*Forward Buying:* Forward buying is the purchase of a site ahead of the need.

*Joint Partnerships:* A joint partnership is the purchase of adjoining sites by the Board and a second party with consideration of possible joint use of grounds and/or facilities.

*Lease Buy-Back:* Lease buy-back is the lease of a site with the option or intention to purchase over time whether built-in to the lease arrangement or in future years.

*Option Agreements:* An option agreement is an agreement to purchase a site at a date in the future with terms and conditions set out at the time of entering into the agreement.

*Site Exchanges:* A site exchange is an exchange between the Board and a second party of designated, optioned, or owned lands.

### **PROCEDURES:**

Alternative accommodations include a variety of strategies such as forward buying, option agreements, purchases, lease buy-back, site exchanges, and joint venture partnerships.

The Board will consider possible arrangements with municipalities, school boards, and persons or bodies in the public or private sector with the following conditions:

- the alternative accommodations must be cost-effective and advantageous to the Board compared to other possible arrangements, including an acquisition of a school site and the construction of a free-standing building;
- the alternative accommodations shall comply with all Ministry of Education guidelines, regulations, and instructions;
- the Board may enter into lease arrangements for school facilities intended to accommodate peak enrolment for a limited time, but shall not entertain such an agreement to accommodate long-term enrolment, unless the agreement allows future ownership at the Board's discretion;
- the Board shall retain sufficient governance authority over the design and operation of the facility to ensure that it is able to deliver the appropriate educational program to its students and to ensure that its identity, ambiance, and integrity are preserved; and

Prior to approving any new school accommodation, the Board will ensure that it has reviewed a full report setting out the possible arrangements that have been considered.