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Hamilton-Wentworth District School Board

Education Development Charges Background Study and Review of Education Development Charges Policies

Date: April 1, 2024



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FOREWORD

On June 17, 2019, the Hamilton-Wentworth District School Board (HWDSB) adopted a successor EDC by-law governing development and redevelopment within the City of Hamilton, and over a 5-year term. The successor by-law rates were imposed beginning July 6, 2019. On March 29, 2019 the Province advised school boards that changes were enacted to the education development charges legislation. The by-law adopted on June 17th reflected the legislative changes adopted by the Province on March 29th.

The following background study and policy review document provides information respecting legislative changes and how the HWDSB is adapting its EDC policies in response; along with incorporating information respecting municipally-approved forecasts of residential and non-residential development; changes to land values within the jurisdiction of the Board; information respecting the legislative provisions dealing with acquiring an interest in land.

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.

Finally, this report includes a copy of the proposed EDC by-law which designates the categories of residential and non-residential development, as well as the uses of land, buildings and structures on which EDCs shall be imposed, in specifying the areas in which the established charges are to be imposed.

ACKNOWLEDGEMENTS

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

Further, the consultants wish to acknowledge the assistance of Mr. Mark Giavedoni, Partner, Gowling WLG, legal counsel for the Board on education development charge matters; the expertise provided by Antec Appraisal Group Inc. on matters dealing with site valuation; as well as Tim Uyl, Vice President of Paradigm Shift Technology Group Inc. (PSTGI) for his company’s assistance in the development of the student enrolment projections and review area mapping.

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Hamilton-Wentworth District School Board – 2024 Education Development Charge Background Study

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 on or before July 6, 2024. The Board will seek input from the public, hold a Policy Review public meeting on Tuesday May 27, 2024. Immediately following, and during the same Board meeting, the board will hold a public meeting to disseminate information about the proposed successor EDC by-law. Finally, the Hamilton-Wentworth DSB will give consideration to the public submissions prior to passage of education development charges proposed for Monday June 17, 2024. By-law implementation is proposed to take place on Monday July 1, 2024, subject to Board approval.

Section 257.62 of the *Education Act* states “an education development charge by-law may be passed only within a period of 365 days following the completion of the education development charges background study.” This EDC background study dated April 1, 2024 will be considered as part of the consideration of successor by-law adoption on June 17, 2024.

During the 2019 EDC by-law process, the HWDSB qualified to adopt a successor EDC by-law on the basis of having a deficit in the Board’s EDC account. At the time of by-law passage, the Board had a projected deficit of just over \$32 million in the EDC account.

For the 2019/20 through 2022/23 period, it was expected that the HWDSB’s EDC by-law would derive \$21.94 million in collections. However, actual collections were \$23.2 million.

The Hamilton boards met with City of Hamilton staff in December, 2023. Staff provided an overview of the history of the no urban boundary expansion growth strategy adopted by the City in June, 2022; the provincial amendments to the City’s Official to allow expansion of the urban boundary in November 2022 and the provincial ‘rewind’ announcement that was legislatively enacted in December, 2023. City staff also provided housing, population and employment forecasts to 2041, by traffic zone, consistent with the Provincial Growth Plan targets. While the City is in the process of revisiting the projections given the provincial policy changes, the information provided was the best information available at the time the EDC forecasts were prepared.

ALTERNATIVE PROJECTS AS A MEANS OF SUPPORTING AFFORDABLE HOUSING INITIATIVES

During November 2019, the province introduced Alternative Projects as a means of reducing land and construction costs in support of provincial affordable housing initiatives.

Alternative Projects afford school boards with the flexibility to allocate EDC funds to the acquisition of land; the acquisition of an interest in land; or a leasehold interest as an alternative to the traditional land purchase process for school sites. An Alternative Project requires the approval of the Minister of Education and must have associated costs that are lower than the cost to acquire a conventional school site. Alternative Projects are not to replace costs that are supported by education funding sources (e.g., operating and facility renewal funds).

In an urban land development environment where a large share of the development is high-rise with significant density value, intensified school sites, including strata interests, may be required to address:

- Land values for stand-alone sites far exceeding the costs of strata interests and the inability of the EDC legislation to fund the costs, due to the legislative cap, and for which there is no alternative funding source;
- The need to support affordable housing policies through intensified land use initiatives by all public sector agencies;
- The scarcity of land of sufficient size to accommodate stand-alone school sites, and the legislative restrictions around the expropriation of properties as part of land assembly strategies;
- The inability to generate sustainable enrolment in fully utilized schools if a significant portion of the net developable lands are taken up with stand-alone school sites. That is, the more land that is consumed for stand-alone school sites, the less land that is available for residential development, along with its student population necessary to support the school over the long term.

While the HWDSB retains the prerogative to build stand-alone schools on conventional school sites, the Board welcomes the opportunity to consider alternative project delivery of new schools, where feasible, and where the proposed alternative project is approved by the Minister of Education. Strata agreements could include the cost to construct the building superstructure; the tenant fit outs; and potentially a share of underground parking and parkland for a school yard. While there are no specific Alternative Projects being considered by the HWDSB (i.e. the majority of the proposed high-rise development in Hamilton is not congregated), there may be areas of increased development density in future that may impact the Board's ability to provide sufficient student accommodation in these areas.

The Hamilton-Wentworth coterminous boards expect to meet with development community stakeholders to review the proposed EDC Submission elements and to discuss the proposed approach to costing any proposed Alternative Projects. This meeting is expected to take place prior to the scheduled public meetings.

RATIONALE FOR ADOPTING AN EDC BY-LAW

The primary purpose of 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). This percentage was established at 15% during the 2019 study process, and just after the legislative amendment to set EDC rate 'caps'.

The EDC calculation is based on new pupils generated by new dwelling units within the jurisdiction of the Hamilton-Wentworth boards, and for which:

- building permits will be issued over the fifteen-year forecast period 2024/25 to 2038/39 academic years;
- additional land or site development costs are required to meet growth-related student accommodation needs; and
- education development charges may be imposed on the new dwelling units (i.e., net of any statutory and Board-approved by-law exemptions).

KEY EDC STUDY COMPONENTS

In determining what level of education development charges are necessary to fund future growth-related school site needs, the following key questions must be explored and answered:

- How many new housing units are expected to be constructed and occupied over the 15 years following by-law adoption and how many HWDSB students will be generated by the new housing units;
- How many pupil places owned and operated by the HWDSB are surplus to existing community enrolment needs, and therefore available to accommodate the new housing development within reasonable proximity (i.e., resident attendance boundary) to the new development, over the long term;
- How much will it cost to acquire and service the land necessary to construct the additional pupil places necessitated by new housing development, and;
- Where land costs are prohibitive due to density value, can the Board secure ownership or an interest in land, and can the Board demonstrate that it can employ alternative means of providing growth-related student accommodation, where appropriate, in a manner that is more cost effective than the traditional EDC approach to land acquisition?

ELIGIBILITY TO ADOPT A SUCCESSOR EDC BY-LAW

In order to be eligible to adopt a successor EDC by-law the HWDSB must demonstrate that it will either have a deficit in the EDC account as of June 30, 2024, or average enrolment over the next by-law period will exceed school capacity on either the elementary or secondary panel. The HWDSB qualifies to adopt a successor EDC by-law on the basis of elementary enrolment in excess of capacity, as well as having a deficit in the EDC account.

FORECASTING DEVELOPMENT

A forecast of new dwelling units and the projected number of HWDSB students to be generated by new housing development in the area in which EDCs are to be imposed, over the 15-year forecast period, were derived from a consideration of:

- Discussions with City of Hamilton Planning and Economic Development – Planning Division staff;
- City of Hamilton Annual Building Activity data 2019-2022;
- City of Hamilton No Urban Boundary Expansion forecast of population, housing and employment by traffic zone 2021-2041;
- City of Hamilton December 5, 2023 report on active official plan amendment, zoning by-law amendment, and Plan of Subdivision Applications (PED23254) (City Wide);
- HWDSB/HWCDSB development activity tracking information;
- Non-residential forecast based on City of Hamilton employment and non-residential gross floor area (GFA) forecast by traffic zone provided by the City on December 14, 2023.

It is important to note that the 15-year EDC housing forecast does not take into consideration any future changes to planning policies, development expectations, timing and location of development, arising from the legislative reversal of official plan decisions affecting urban boundaries. The Government of Ontario removed 795 hectares of land from the Greenbelt within the City of Hamilton on December 16, 2022 and rescinded this decision on December 6, 2023. Within the City of Hamilton this has the effect of removing large tracts of potential urban expansion lands like Elfrida, from consideration for development, at least for the foreseeable future.

The housing forecast data supplied by City staff incorporated housing by density and by traffic zone, as a control total. Development applications outlined in the December 5, 2023 report to City of Hamilton Planning Committee were used to derive a density and location-specific dwelling unit forecast. A spatial matching of the HWDSB elementary school attendance boundaries against the housing forecast differentiated by type of dwelling unit was undertaken by PSTGI.

The dwelling unit and phasing of development forecast derived as the basis for the determination of the proposed EDC charge is net of the residential statutory exemptions related to housing intensification as specified in the EDC Regulation. However, EDC statutory exemptions do not include secondary dwelling units built on the same property and separate from the original dwelling unit.

The forecast of residential development suggests that approximately 66,000 new occupied dwelling units will be added to the existing housing stock in the jurisdiction over the next fifteen years, at an average of 4,400 units per annum. The 66,000 additional units is comprised of 54,600 taken from the City’s forecast plus 11,400 of the 44,000 housing pledge units. It is important to note the housing pledge units are spread out over the first 12 years of the 15-year forecast period. Of the additional dwelling units, approximately 7% are anticipated to be low density (single and semi-detached); 14% medium density (row houses, townhouses, etc.); and the remaining 79% high density apartment units, including mixed-use high-rise developments.

There is an 8.2% reduction from gross units to net units based on the difference between the number of new dwellings created over the last by-law period and the number of units that actually paid EDCs, consistent with section 7 (1) 1 of O. Reg. 20/98.

The forecast of non-residential development is based on the City of Hamilton employment forecast by traffic zone that is based on the 2021-2051 growth plan targets, under the No Urban Boundary growth scenario. The employment forecast is converted to GFA based on the conversion factors set out in the City’s 2023 DC study. The projection of additional non-residential gross floor area (GFA) over the 15-year forecast period is 30.7 million square feet of additional GFA, or 21.265 million square feet of “net” gross floor area.

REVIEW AREA BOUNDARY CHANGES

No modifications were made to the elementary or secondary EDC Review Area boundaries found in the Board’s 2019 EDC study, other than to redirect Mount Hope PS boundary to PE02 – Ancaster.

FORECASTING STUDENT ACCOMMODATION NEEDS

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 the purposes of determining successor by-law adoption eligibility, and that, in the opinion of the Board could reasonably be used to accommodate growth-related pupils. Secondary capacity is loaded at 23 pupils per classroom, rather than 21 pupils per classroom requirement during the 2019 by-law study process, as per Ministry directives.

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 the Board’s jurisdiction. The information respecting projected enrolment and growth-related site needs is compared to, and aligned with, the Board’s capital priority needs, where Board decisions have been made, or are being contemplated.

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.”

The jurisdiction-wide mid-2024 to mid-2039 projections of enrolment indicate that, for the HWDSB, the number of elementary pupils will increase by 5,680 (43,369 – 37,689). Secondary enrolment is expected to increase by 1,662 pupils (16,672 – 15,010) on a jurisdiction-wide basis. The EDC enrolment projections are approved by the Minister of Education as part of the review of the EDC Submission.

Ministry of Finance (MoF) Summer, 2023 population projections (Hamilton-Wentworth Region) for the mid-2024 to mid-2039 forecast period determine a 27% increase in elementary school age population (4–13-year-olds). The HWDSB projections are approximately 7% lower than the projected increase in 4-13-year-olds.

Detailed student enrolment projections for each school are found in Appendix A.

The 15-year housing forecast has been attributed to each elementary and secondary school based on the location of proposed residential development spatially-matched to the elementary and secondary school attendance boundaries approved by the Board. The Requirements of New Development, or ROND, is therefore determined on a school-by-school basis, not a Review Area basis. The individual schools that will be impacted by new housing development are subsequently reviewed to determine their ability to accommodate additional student enrolment from new development. Where it is determined that there is a need to acquire additional land to accommodate further enrolment growth; the number of additional pupil places required, along with the potential cost to acquire and service the lands; is the key determinant to establishing projected net education land costs.

The determination of net growth-related pupil places (NGRPP) and associated growth-related site needs reflect:

- projected mid-2024 to mid-2039 growth within each of the 10 elementary and 3 secondary review areas, taking into consideration housing development by school and the extent to which individual schools will be affected by that development;
- site costs and site preparation/development costs reflect a combination of the Board’s site acquisition experiences and appraisal research undertaken by Antec Appraisal Group Inc., on the Board’s behalf.

RESULTING PROPOSED EDC RATES

The EDC forms for the Board were submitted to the Ministry of Education for review and approval on March 17, 2024.

A school board is entitled to impose up to 40% of the net education land costs against non-residential development. Historically, the Hamilton-Wentworth boards have adopted 85% residential and 15% non-residential shares.

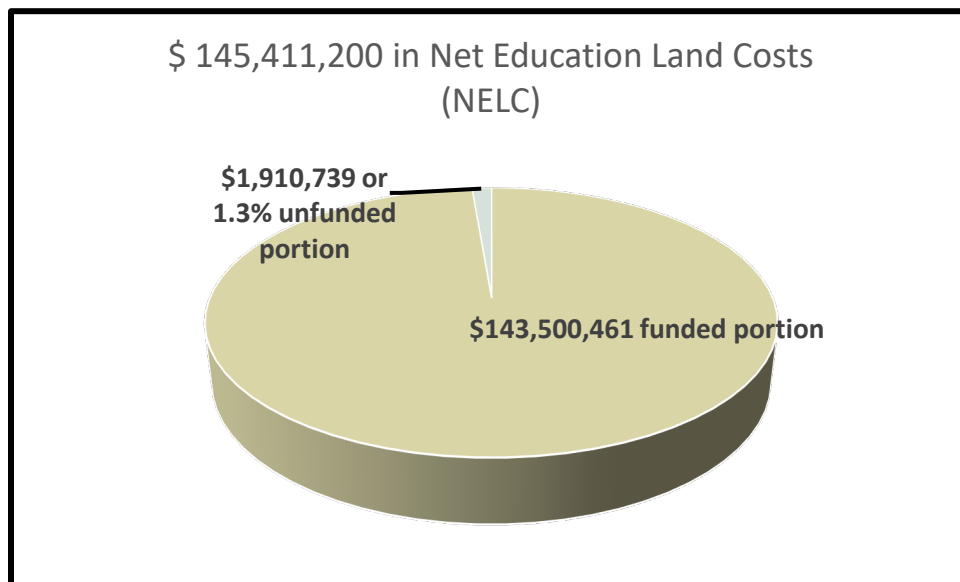
Previous EDC study approaches were designed to determine what EDC rates needed to be imposed in order to fund 100% of the forecasted net education land costs – known as the ‘calculated rates’. However, the March 2019 changes to the legislation establish the EDC rates to be imposed at the time of building permit issuance, subject to the rate increases specified in the legislation, and

provided that the legislative ‘capped’ rates do not exceed the EDC ‘calculated rates’. Therefore, the proposed education development charge for the HWDSB, where 85% of the costs are recovered from residential development, are as follows:

	2024 EDC Calculated Rates	In-force By-law Rates to July 5, 2024	Year 1 EDC Rates July 1, 2024 to June 30, 2025	Year 2 EDC Rates July 1, 2025 to June 30, 2026	Year 3 EDC Rates July 1, 2026 to June 30, 2027	Year 4 EDC Rates July 1, 2027 to June 30, 2028	Year 5 EDC Rates July 1, 2028 to June 30, 2029
HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD (based on 85% residential/15% non-residential shares)							
<i>Residential EDC Rate per Dwelling Unit</i>	\$2,040	\$1,573	\$1,873	\$2,040	\$2,040	\$2,040	\$2,040
<i>Non-residential EDC Rate per Sq. Ft. of GFA</i>	\$1.03	\$0.50	\$0.60	\$0.70	\$0.80	\$0.90	\$1.00

The total net education land costs for the Hamilton-Wentworth District School Board, escalation of land, site acquisition costs, site development costs, associated financing costs and study costs, less any EDC account balances, are \$145,411,200 to be recovered from 60,588 “net” new units and 21,265,271 sq ft of non-residential GFA. A ‘calculated’ residential rate of \$2,040 per dwelling unit and \$1.03 per square feet of non-residential development (based on 85% residential and 15% non-residential shares) would be required to fund the \$145,411,200 in net education land costs, leaving a Year 15 deficit of \$1,910,739 in funding shortfall due to the ‘cap’, plus a shortfall of \$44,168.

Should the legislation cap increases continue over the 2024/25 to 2038/39 forecast period, and provided that land acquisition & site preparation escalation cost don’t exceed 5% and 2.75% respectively over that time, the following is a summary of the funding sources and expenditure requirements, necessary to pay for 100% of the growth-related net education land costs over the 15-year forecast period:



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Chapter 1 - INTRODUCTION

1.1 Legislative 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. Net education land costs are defined by the legislation to be:

- Costs to acquire land, or an interest in land, including a leasehold interest, to be used by the board to provide pupil accommodation;
- Costs to provide services to the land or otherwise prepare the site so that a building or buildings may be built on the site to provide pupil accommodation;
- Costs to prepare and distribute the EDC background studies;
- Interest on money borrowed to pay for land acquisition and site servicing;
- Costs to undertake studies in connection with land acquisition.

It is noted that the acquisition of an ‘interest in land’ is not defined in the legislation. This EDC-eligible cost is considered in more depth in Chapter 6 of this report.

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 residential growth within their 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 average projected enrolment over the five-year by-law 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. An unmet financial obligation is also not defined in the legislation.

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, to improve cost recovery and deal with short term cash flow shortfalls. 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), subject to the legislative ‘cap’ provisions. Reflecting lower costs through by-law amendment may be necessary to ensure future successor by-law eligibility. 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. In addition, a school board may pass a by-law amendment to recognize agreements approved by the board to acquire sites approved by the Minister post by-law adoption. By-law amendment and renewal requires a reconciliation of the EDC account under section 7(5) of O. Reg. 20/98 and affords the opportunity to assess actual versus projected student enrolment and its impact on growth-related student accommodation needs. In other words, the transition from one by-law to another is an opportunity to replace what are estimates and projections at the time the by-law is passed, to actual collections, expenditures and growth-related site requirements.

1.2 Hamilton-Wentworth District School Board EDC By-law

The Hamilton-Wentworth District School Board (HWDSB) has imposed education development charges since June 22, 2013 under the legislative authority of the *Education Act*, R.S.O., 1990. In each of 2013, 2014 and 2019, the Hamilton-Wentworth District School Board-adopted jurisdiction-wide by-laws applied to the entire City of Hamilton. While the Board has the legislative authority to consider the adoption of multiple area-specific by-laws, the total EDC rates by residential and non-residential development are lower when averaged across the jurisdiction.

However, should the HWDSB determine that it may wish to consider the adoption of area specific by-laws, then a new EDC Background study would have to be undertaken consistent with multiple by-law structures, before the Board could consider the adoption of successor EDC by-laws.

1.3 Acquiring Land and an Interest in Land

‘Education land costs’ as defined in section 257.53 (2) of the *Education Act* include costs incurred or proposed to be incurred to acquire land or an interest in land, including a leasehold interest (i.e., only the capital component of a lease). However, the cost of any building to be used to provide pupil accommodation is excluded as an education land cost, unless approved by the Minister as an Alternative Project. Further, O. Reg 20/98 sets a *maximum* per acre standard of approximately one (1) acre per 100 elementary pupils and 1.2 to 1.25 acres per 100 secondary pupils. This standard was developed by the school board Expert Panel at a time when the majority of the land development surrounding schools was ground-related (i.e., low and medium density development).

In circumstances where per acre land values are well beyond typical suburban land values, due to the approved density related to more vertical development, the *maximum* Regulation benchmark standard is cost prohibitive, and contrary to more recent affordable housing initiatives. The November 2019 changes to the education development charges portion of the *Education Act* provide

opportunities for school boards to entertain Alternative Projects. With the permission of the Minister of Education, a school board may use EDC funds towards a lower cost alternative site acquisition – an Alternative Project. Alternative Projects are expected to reduce EDC rates, in that less land is taken to provide student accommodation and associated school building amenities (e.g., land for playfield space and parking).

An Alternative Project may involve either the acquisition of reduced land by the school board; or entering into a strata agreement as part of acquiring an interest in land; or entering into a long-term leasehold arrangement (e.g., a secondary school as part of an office tower). Alternative Projects are intended to provide a more cost-effective approach to the provision of growth-related student accommodation needs where the density value of the land is high and the development of the land in question involves a variety of uses, as opposed to a stand-alone school site. Alternative Projects may include: stand-alone school sites where cost savings are achieved by reducing the site size, or incorporating underground parking for instance. Alternative Projects can also be schools built as part of, but adjacent to, other portions of the development where the school may acquire or lease the land outright; and finally, as schools built as part of podium developments and integrated within vertical residential or non-residential towers (see architectural renderings below) In the latter case, the expectation is that the school board is typically acquiring an interest in the land through a strata agreement.

STAND-ALONE SCHOOL SITE -



Viola Desmond ES, Hamilton

ADJACENCY SCHOOL AS PART OF MULTI-USE DEVELOPMENT -



TDSB North Toronto Collegiate – CSP Architects

VERTICAL SCHOOL AS PART OF A PODIUM STRUCTURE -



TDSB proposed elementary school Pinnacle One Yonge – Hariri Pontarini Architects

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 the education development charge policies of the Board. The Hamilton-Wentworth DSB (HWDSB) propose to conduct public meetings in respect of the policy review and successor by-law consultation process. The HWDSB meeting will be held Monday May 27, 2024 at 7:00 PM in the Hamilton-Wentworth District School Board offices located at 20 Education Court, Hamilton. Information respecting a review of the Board’s policies is being made available to the public as part of this document. This information is titled, ‘Background Document Pertaining to a Review of the Education Development Charge Policies’ is found in Appendix C of this document.

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 will immediately follow the policy review public meeting on Monday May 27, 2024 at 5:30 PM, and will also be held in the HWDSB Board Room.

Finally, the Hamilton-Wentworth DSB is expected to consider the adoption of a new education development charge by-law to replace the current by-law on Monday June 17, 2024 7:00 PM at the same location. As set out in the following notice, anyone wishing to delegate the Board on EDC matters may make arrangements to do so by contacting the Board.

A copy of the “Notice of Public Meetings” is set out on the following page.



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

**FIRST MEETING – POLICY REVIEW
MONDAY, MAY 27, 2024 @ 7:00 PM
HWDSB Boardroom, 20 Education Court, Hamilton**

TAKE NOTICE that on May 27, 2024, 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, MAY 27, 2024 @ 7:30 PM
HWDSB Boardroom, 20 Education Court, Hamilton**

AND FURTHER TAKE NOTICE that on May 27, 2024, 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, June 17, 2024, 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 April 15, 2024, at the Board's administrative offices during regular office hours and on the Board's website at www.hwdsb.on.ca.

**THIRD MEETING – IN CONSIDERATION OF BY-LAW ADOPTION
MONDAY, JUNE 17, 2024 @ 7:00 PM
HWDSB Boardroom, 20 Education Court, Hamilton**

AND FURTHER TAKE NOTICE that on Monday, June 17, 2024, 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: Heather Miller, Officer, Trustee Services
20 Education Court, P.O. Box 2558, [Hamilton, ON](http://www.hwdsb.on.ca) L8N 3L1
T: 905.527.5092 x.2279
Email: hmiller@hwdsb.on.ca

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

Sheryl Robinson [Petrazzini](http://www.hwdsb.on.ca), Director of Education

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 and the number of existing pupil places that could reasonably be used to accommodate new school pupils.
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 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.

The HWDSB is eligible to adopt a successor EDC by-law during June 2024 given that the Board’s elementary enrolment will exceed available capacity over the term of the proposed by-law and there will be a deficit in the EDC account. However, the construction of additional pupil places, without rationalization of surplus pupil places in areas of limited or no residential development, may impact the HWDSB’s ability to qualify to adopt a successor by-law in future.

1.6 Eligibility to Impose Education Development Charges and Form A

Form A of the EDC Submission, which follows, demonstrates that the head count enrolment over the proposed 5-year term of the EDC by-law (2024/2025 to 2028/2029), as measured in October and March of each academic year. The Board’s available permanent capacity on the elementary panel is less than the average 5-year enrolment projections over the time-period referenced above. The financial obligations estimated to June 30, 2024 determine that the HWDSB has recovered over \$65.18 million in EDC funds since June 22, 2013 (including accrued interest and net of any interest expense), and has expended just under \$69.76 million in the same timeframe, leaving a deficit of \$6.6 million.

For the HWDSB, the five year (2024/25 to 2028/29) average head count enrolment is 38,586 for the elementary panel and ADE average enrolment of 15,725 on the secondary panel. When these figures are compared to 38,248 permanent spaces in the Board’s existing inventory of elementary facilities and 18,099 permanent spaces on the secondary panel, enrolment is greater than capacity on the secondary panel.

It is noted, however, that the legislation allows the Board to utilize education development charges as a source of funding for additional site purchases due to enrolment growth on both panels (elementary and secondary), even if the Board only meets the legislative “trigger” on only one panel.

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD Education Development Charges Submission 2024 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 2024/ 2025	Year 2 2025/ 2026	Year 3 2026/ 2027	Year 4 2027/ 2028	Year 5 2028/ 2029	Average Projected Enrolment Over Five Years	
38,248	37,879	38,326	38,683	38,865	39,178	38,586	338

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 Average Projected Enrolment less Capacity
	Year 1 2024/ 2025	Year 2 2025/ 2026	Year 3 2026/ 2027	Year 4 2027/ 2028	Year 5 2028/ 2029	Average Projected Enrolment Over Five Years	
18,099	15,365	15,566	15,743	15,961	15,988	15,725	-2,374

A.2: EDC FINANCIAL OBLIGATIONS (Estimated to April 30 2024)

Adjusted Outstanding Principal:	\$69,760,578
Less Adjusted EDC Account Balance:	\$63,183,724
Total EDC Financial Obligations/Surplus:	-\$6,576,854

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 within 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 within the HWDSB jurisdiction - 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 and Appendix A
4. for each school in the board’s inventory, the number of existing pupil places and the number of pupils who attend the school – Appendix A
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 6
7. the number of pupil places the board estimates will be provided by the school to be built on the site and the number of those pupil places that the board estimates will be used to accommodate the new pupils in item #2 – Appendix A.

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 April 1, 2024 will be considered for approval by the Board, as part of the meeting on June 17, 2024, which will also consider by-law adoption.

Further, this report will be forwarded to the Minister of Education and each coterminous 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 Education Development Charges Process and Timelines

PHASE ONE DETERMINING ELIGIBILITY	PHASE TWO ANALYSIS OF NGRELC ¹	PHASE THREE ALTERNATIVE PROJECTS & LEDAs	PHASE FOUR MINISTRY SUBMISSION	PHASE FIVE STAKEHOLDER CONSULTATION PROCESS	PHASE SIX BY-LAW ADOPTION & IMPLEMENTATION
A. Capacity Trigger Evaluation and Notify Ministry of Education if Board Intends to Exclude Capacity	A. 15-year Estimate of Amount, Type and Location of Residential Development and Non-Residential GFA Projections (net of statutory exemptions)	A. Determine Areas where Density Value & proposed growth-related sites indicate potential for Alternative Projects and LEDAs	A. Completion of Ministry Forms (EDC Submission)	A. Follow-up Consultation with Stakeholders re Basis for Charges and % Unfunded Costs	A. Liaison with Area Municipal Representatives re By-law Interpretation, Implementation & Collection Issues
B. EDC Account Analysis - determine sites proposed to be acquired & sites acquired, what has been fully or partially funded and reconcile account	B. Prepare 15-year student enrolment projections - Existing Community Requirements plus Requirements of New Development and Determine if there is a Need to Alter Review Area boundaries given Capital Priorities & planning areas	B. Prepare land valuations based on conventional and strata builds	B. Complete Background Study and Forward to Ministry, Co-terminous Boards & Stakeholders who have provided notification (90 days in advance of by-law passage date)	B. Conduct Public Meeting(s) including Policy Review Public Meeting	B. Board Consideration of Public Input and Calculation Revisions as necessary (may require additional Ministry Review/approval or request for additional data)
C. EDC Financial Obligations Evaluation (including how Financial Obligations will be repaid)	C. Review Area Analysis to Determine Schools Impacted by New Housing Development	C. Define Area Specific By-law Structure if LEDA is contemplated	C. Preparation & Public Distribution of Policy Document	C. Review of Public Submissions	C. Additional Public Meeting at Discretion of Board
	D. Forecast of Net Growth-related Pupils and Determine # of Sites, Site Expansions and/or Site development Costs by Location	D. Review Status of Ministry Approval of Site Acquisitions	D. Ministry of Education Review & Approval Process (90 days review period)		D. By-law Adoption
	E. Estimate Growth-related Net Education Land Costs (net of any surplus EDC account funds)				E. By-law Implementation
	F. Calculate NELC on a Cashflow basis and Determine Portion of NELC to be Funded from EDCs given Legislative 'Cap'				F. Notice of By-law Passage & Appeal Date, Municipal Notification of By-law Passage and Implementation Considerations

1. NGRELC = Net Growth-related Education Land Costs

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 primarily 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 cash flow 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 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 and for which education development charges would be imposed during the 2024/25 to 2038/2039 forecast period.

A forecast of new dwelling units in the area in which EDCs are to be imposed, over the 15-year forecast period, were derived giving consideration to:

- Discussions with City of Hamilton Planning and Economic Development – Planning Division staff;
- City of Hamilton Annual Building Activity data 2019-2022;
- City of Hamilton No Urban Boundary Expansion forecast of population, housing and employment by traffic zone 2021-2041;
- City of Hamilton December 5, 2023 report on active official plan amendment, zoning by-law amendment, and Plan of Subdivision Applications (PED23254) (City Wide);
- HWDSB/HWDSB development activity tracking information;
- Non-residential forecast based on City of Hamilton employment and non-residential gross floor area (GFA) forecast by traffic zone provided by the City on December 14, 2023.

A spatial matching of the HWDSB elementary school attendance boundaries against the draft annual housing forecast by density type, was undertaken. 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 redevelopment credits.

The forecast of non-residential development is based on the City of Hamilton sources described above, as well as historical non-residential building permit data by type and detailing additions and new construction.

Step 2- The draft by-law structure is based on a jurisdiction-wide rather than an area-specific approach to the by-law structure. The policy reasons for this choice are outlined in Appendix C. The elementary and secondary review areas are consistent with the review area constructs approved by the Board when the 2019 EDC by-law was adopted, except for the inclusion of Mount Hope PS in PE02. Review Area boundaries continue to consider the accommodation of pupils in their resident areas over the longer term, as well as 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 ECIS facilities inventory information to determine the OTG (On-the-Ground) capacities 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.

Steps 4 through 6- Determine the Board’s projections of enrolment, by school, by grade, by program 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 Kindergarten registrations, and the by-grade advancement of the student population) from the pupil requirements of new development (the number of pupils anticipated to be generated by new development within the jurisdiction 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. In some cases, these students are directed to future school boundaries proposed by board staff, as current ‘holding’ pupils.

Steps 7 and 9 - Determine the number of “available” pupil places by comparing the Year 15 projected head count enrolment from the total capacity of schools within the high-growth development areas. The Board is entitled to exclude any available pupil places that in the opinion of the Board, could not reasonably be used to accommodate enrolment growth. Schools within each Review Area are distinguished between those that have been, and will be impacted by the construction of new homes within their attendance boundaries, from those that are not. The determination of 15-year growth-related needs is relevant to the first category of schools – not the latter.

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 8- Complete Form A of the EDC Submission to determine eligibility to impose education development charges. This involves a detailed analysis of the EDC account and the need to project the balance in the account as of the day prior to implementation of the new EDC by-law.

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. The acquisition of lands may also involve the acquisition of lands declared ‘surplus’ by coterminous school boards. Further, meeting growth-related accommodation needs can be accomplished through the redevelopment of existing schools and the provision of increased capacity as a result. Finally, where land costs are prohibitive, the board can acquire an interest in land through the imposition of education development charges, where the costs to do so reflect a more cost-effective approach to meeting growth-related needs.

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

2.2 Financial Component:

The financial component of EDC studies has changed. Prior to 2019, the EDC financial analysis was designed to determine residential and non-residential rates, when imposed, would, over the 15-year forecast period, equal the forecasted net education land costs. Today, these derived rates are called the ‘calculated’ rates.

The March 29, 2019 change in the Regulation placed a ‘cap’ on EDC rates. As such, the more recent EDC financial analysis is designed to address the following questions:

1. If the legislation permitted the imposition of the ‘calculated rates’, what rates would be required to fully fund the projected net education land costs?
2. Given that the board can only impose the ‘capped’ rates, what funding shortfall is expected to be derived over the 15-year forecast period?
3. Given that the legislative cap establishes the maximum projected revenue to be derived during the 15-year forecast period, what additional growth-related and costs are expected to be derived over the 15-year forecast period for which no additional EDC funds are available (i.e., unless the legislative cap is lifted)?
4. What is the financial impact in Years 6, 11 and 15 as the board renews the EDC by-law and extends the residential forecast period, if the legislative ‘cap’ in its current form were to remain in place?

Step 1- Identify the land acquisition costs (on a per acre basis) in 2024 dollars.

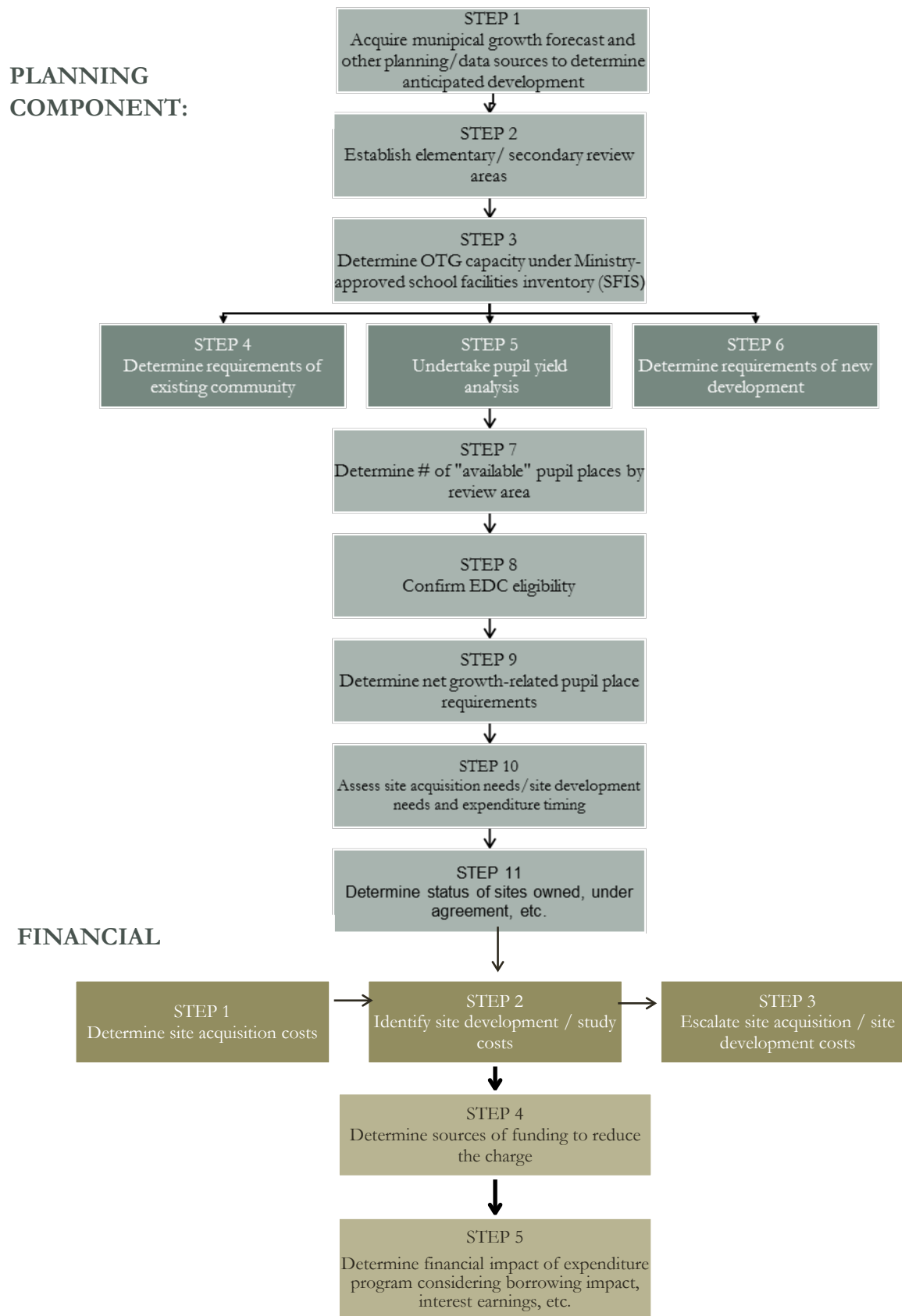
Step 2- Identify site development, site preparation and applicable study costs specified under 257.53(2) of the *Education Act*. In the case of Alternative Projects, the EDC-eligible costs may include construction of the school building, underground parking and potentially shared parkland.

Step 3 - Apply an appropriate indexation factor to site preparation/development costs to recognize increased labour and material costs over the 15-year forecast period. Apply an appropriate land escalation factor to site acquisition costs for the entire forecast period, in order to properly reflect potential unfunded costs.

Step 4 - Determine the quantum of the charge (both residential and non-residential if the Board intends to have a non-residential charge), considering borrowing impact (particularly where there is significant deficit EDC account balances) and EDC account interest earnings by undertaking a cash flow analysis of the expenditure program over the 15-year forecast period. From a borrowing perspective, this could include an external Line of Credit specifying the interest rate to be paid and the payback period. The Board's ability to access any Line of Credit specifically for EDCs is dependent upon certainty in the application of the EDC by-law and in-force rates that are sufficient to fund the principal plus borrowing costs over the borrowing term.

Finally, it is important to understand, given the fact that the EDC revenue stream is fixed, what additional costs are likely to be incurred over the 15-year forecast period and for which there is currently no funding source.

FIGURE 2-1 EDC METHODOLOGICAL APPROACH



¹ 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)

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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.” The jurisdiction of the HWDSB comprises a singular ‘region’ outlined in the EDC regulation.

The determination of proposed EDC rates found within this report is based on a singular region-wide by-law charging structure.

Maps 3-1 and 3-2 found at the end of this chapter, outline the geographic jurisdiction analyzed in this EDC Background report and the elementary and secondary Review Areas used to determine growth-related education land costs.

3.2 Analysis of Pupil Accommodation Needs by “Review Area”

In order to attribute the number of pupil places that would be generated within the areas in which additional residential development is contemplated, the Board’s jurisdiction was divided into sub-areas in 2013, referred to in the EDC submission as “Review Areas.”

The total OTG capacity of all existing permanent accommodation is considered to be the total available capacity of the Board for instructional purposes and required to meet the needs of the existing community, as a first priority. Subsequently, the school board is entitled to recognize and remove any capacity that is not available to be used to accommodate growth-related pupils, provided that an explanation is given for the exclusion. As such, the use of permanent accommodation spaces within a review area is based on the following parameters:

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 for the schools impacted by new housing construction fill any surplus available OTG capacity within the development catchment area, taking into consideration that the perpetual busing of students is not a cost effective or efficient system of student accommodation.
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, provided that they are consistent with the board’s short and longer-term capital priority

needs and anticipated capital funding approvals. Meeting the growth-related pupil place requirements does not always require the acquisition of land; acquiring an interest in land, or leasing additional pupil places.

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 offering standard school programs within their resident area (for example, new housing development is not assigned to single-track French Immersion schools). Therefore, not all existing available capacity within the review area provides a viable solution to accommodating pupils generated by the construction of new homes.

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. Further, proposed boundary adjustments reflecting the provision of new schools, are representative of where students are expected to be accommodated over the forecast period. This is representative of current board-registered pupils that are holding in alternate accommodation awaiting the new school.

The determination of growth-related needs also takes into consideration increased enrolment within the existing community projections. Typically, existing community enrolments will decline over the 15-year forecast period without continued housing development generating additional pupils for the school. Where the existing community enrolment continues to increase, it is due to one or more of the following:

- Delayed permit approvals, construction and occupancy of residential development attributed to the particular school, and occurring prior to the proposed by-law, and resulting in delayed school registrations;
- The actual apportionment shares related to the new school are higher than were projected during a previous by-law;
- Actual births within the catchment area of the new school are higher than originally predicted;
- Immigration policies are directing families to particular communities and employment opportunities;
- The residential density mix, and related occupancy of homes built prior to the proposed by-law, is generating a higher share of family-occupied homes – that is, the pupil yields are higher than projected.

The identification of growth-related site needs as described in the legislation was always intended to allow for transitional replacement of actual accommodation circumstances for previous by-law projections.

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; and
2. Pupils generated by new development should not exacerbate a board’s current accommodation problems (i.e., an increasing portion of the student population being housed in portables for longer periods of time); and
3. Only the projected housing development expected to impact the need for new student accommodation should be taken into consideration in determining the growth-related land needs; and
4. Board transportation costs should be minimized.

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

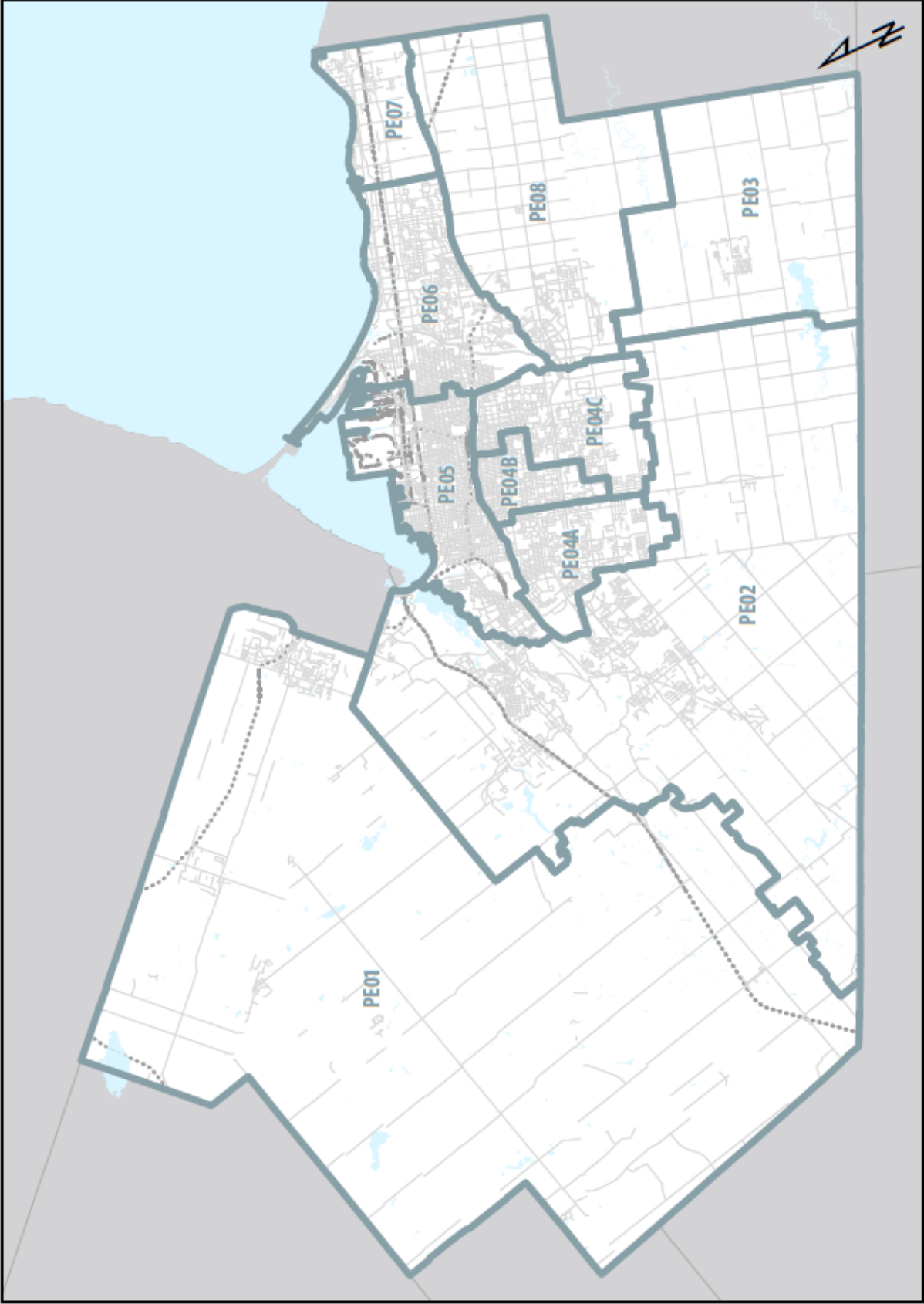
- a. A desire by the Board to align feeder school patterns as students move from kindergarten to elementary and secondary programs;
- b. Board-approved school attendance boundaries and proposed changes to attendance boundaries as new schools open;
- c. Travel distances to schools consistent with the Board’s transportation policies;
- d. Manmade or natural barriers (e.g., existing or proposed major arterial roadways, expressways such as Highway 401, 407 and Highway 412, 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 regional approach to calculating education development charges, the Hamilton-Wentworth District School Board has 10 elementary review areas and 3 secondary review areas as shown on Maps 3-1 and 3-2, at the end of the chapter.

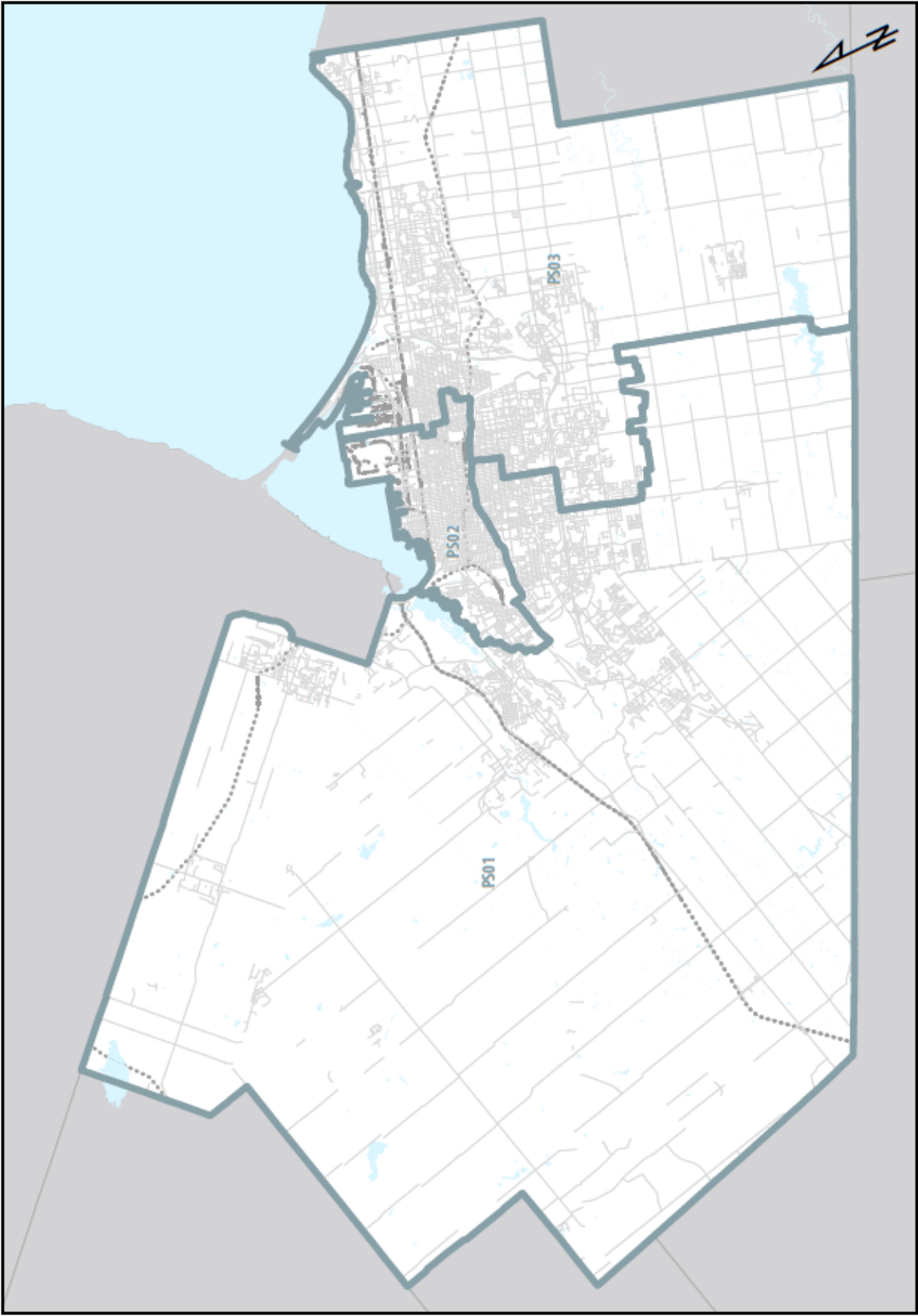
Each review area has been further subdivided in order to determine the net growth-related pupil place needs. Detailed development application databases enable the Board to specify which existing and proposed school sites will be impacted by new housing development by municipal address. The determination 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, and for which Board staff have identified an accommodation need requiring future capital priorities funding.

It is noted that undertaking the determination of additional site requirements using a review area and a sub review-area approach is consistent with the way in which requests for capital priorities funding will be assessed by the Ministry of Education.



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024
Elementary Review Area: Overview

Map 3-1



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Secondary Review Area: Overview



Map 3-2

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Chapter 4 - RESIDENTIAL/NON-RESIDENTIAL GROWTH FORECAST

4.1 Background

This section of the report deals with the 15-year forecast of residential and non-residential development for the 2024/25 to 2038/39 forecast period. The legislative requirements respecting EDC growth forecasts cite the need to identify the anticipated timing, location, and type of residential development, which are critical components of the overall EDC process due to the inextricable link between new units and the need for 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 the most recent residential and non-residential forecast information and development application data available.

The forecast of new dwelling units and the projected number of HWDSB students to be generated by new housing development in the area in which EDCs are to be imposed, over the 15-year forecast period, was derived from a consideration of:

- Discussions with City of Hamilton Planning and Economic Development – Planning Division staff;
- City of Hamilton Annual Building Activity data 2019-2022;
- City of Hamilton No Urban Boundary Expansion forecast of population, housing and employment by traffic zone 2021-2041;
- City of Hamilton December 5, 2023 report on active official plan amendment, zoning by-law amendment, and Plan of Subdivision Applications (PED23254) (City Wide);
- HWDSB/HWDSB development activity tracking information;
- Non-residential forecast based on City of Hamilton employment and non-residential gross floor area (GFA) forecast by traffic zone provided by the City on December 14, 2023.

A spatial matching of the HWDSB elementary school attendance boundaries against the consultant-prepared housing forecast, was undertaken. The housing forecast suggests that approximately 66,000 new occupied dwelling units will be added to the existing housing stock within the Board's jurisdiction over the next fifteen years, at an average of 4,400 units per annum. The City's building permit activity December, 2023 report indicates 4,263 new residential units were added in 2023. The 66,000 additional units is comprised of 54,600 taken from the City's forecast plus 11,400 of the 44,000 housing pledge units. It is important to note the housing pledge units are spread out over the first 12 years of the 15-year forecast period. Of the additional dwelling units, approximately 7% are anticipated to be low density (single and semi-detached); 14% medium density (row houses, townhouses, etc.); and the remaining 79% high density apartment units, including mixed-use high-rise developments.

There is an 8.2% reduction from gross units to net units based on the difference between the number of new dwellings created over the last by-law period and the number of units that actually paid EDCs, consistent with section 7 (1) 1 of O. Reg. 20/98.

The forecast of non-residential development is based on the City of Hamilton employment forecast by traffic zone that is based on the 2021-2051 growth plan targets, under the No Urban Boundary growth scenario. The employment forecast is converted to GFA based on the conversion factors set out in the City’s 2023 DC study. The projection of additional non-residential gross floor area (GFA) over the 15-year forecast period is 30.7 million square feet of additional GFA, or 21.265 million square feet of “net” gross floor area.

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(1)
- “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 10
- “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(1) 8)

During the 2019 EDC by-law adoption process, the Board approved 85% of the net education land costs to be funded from residential development, with 15% to be funded from non-residential development.

4.3 Residential Growth Forecast and Forms B and C

4.3.1 Historical New Residential Units

The City of Hamilton building permit data provides a variety of information on residential starts, completions, demolitions and the number of additional units for which building permits were approved. Table 4-1 below, summarizes the number of new units by type for the period 2017 through 2022. Approximately 23% of the units were single and semi-detached; 32% were medium density townhouses and duplexes of various typologies and just over 45% apartments, including apartments in mixed use developments.

Table 4-1

New Residential Building Permits - City of Hamilton				
Year	Single & Semi Detached Dwellings	Multiples¹	Apartments	Totals
2019	899	703	849	2,451
2020	769	678	1135	2,582
2021	533	1403	2293	4,229
2022	694	1262	1459	3,415
Average 2019-2022	724	1012	1434	3,169
% by Category	22.8%	31.9%	45.2%	100%

1. Includes townhouses and apartments in duplexes

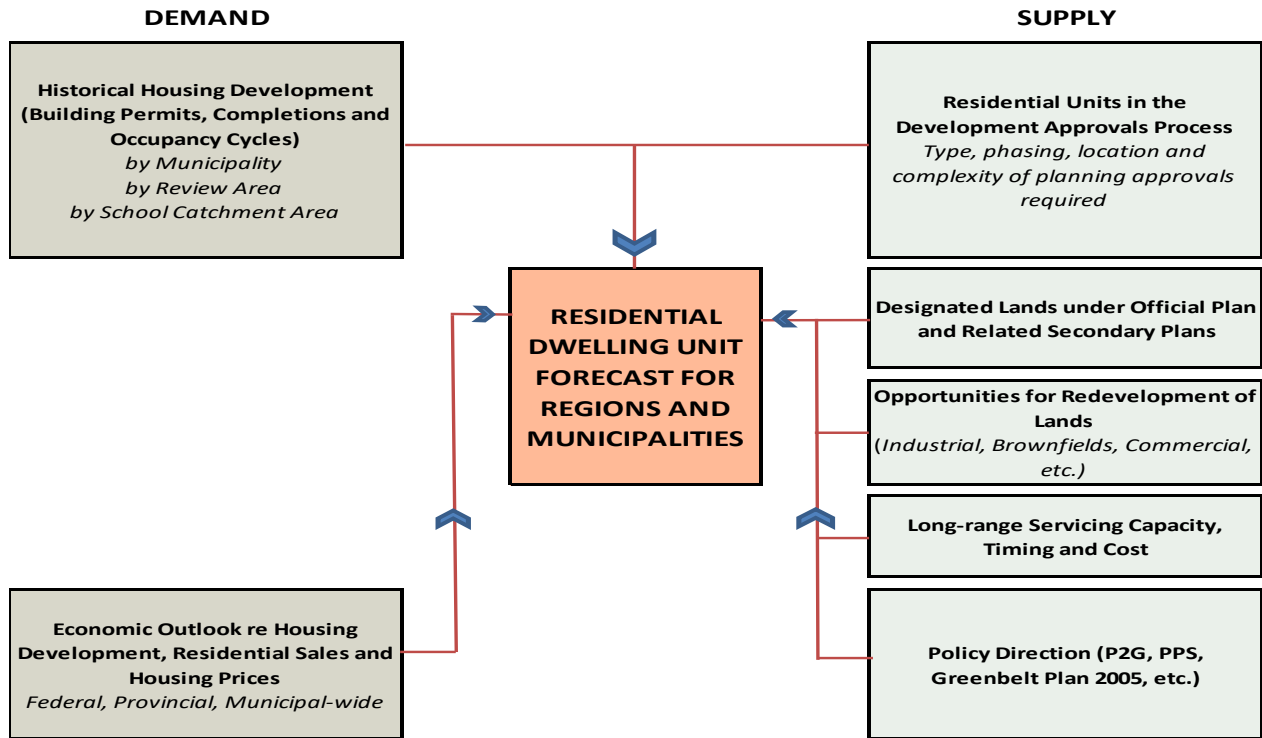
# of New Residential Units Paying EDCs 2019-2022				
2020				2,561
2021				3,411
2022				3,415
TOTALS				9,387
New Units 2020-2022				10,226
% New Units Paying EDCs				91.8%

4.3.2 Methodological Approach

Municipal forecasts of residential development generally give consideration to: underlying demographic trends, timing and location of infrastructure emplacement, local planning policies (Official Plan and Secondary Plans), Provincial planning policies, considerations of demand (including recent and projected real estate market conditions and recent historical construction statistics) and supply (land supply and absorption rates), staging of units in the development approvals process, government housing policies affecting housing affordability, etc. Figure 4-1 illustrates a typical household formation projection methodology.

FIGURE 4-1

**Residential Growth Forecast: Proposed Methodology
Household Formation Projection Model**



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. The municipal development charge legislation exempts both secondary units within the principal residence, as well accessory dwellings that are constructed on the same property as the original building. The EDC legislation does not. At this time, there is limited available data that would allow for distinguishing between secondary dwelling units within the existing primary residence and those constructed as stand-alone units on the same property.

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. It is important to note, as a higher percentage of residential development occurs through redevelopment going forward, providing a one-for-one exemptions of all dwelling units replaced, will result in additional unfunded net education land costs that are difficult to quantify, as it is more difficult to predict how much residential redevelopment will occur over a 15-year forecast period.

4.3.3 Net New Units and Forms B and C

Table 4-2 summarizes the jurisdictional housing forecast by unit type for the 2024/25 through 2038/39 period – Forms B and C of the EDC Submission. The table also provides a summary of the housing forecast by HWDSB elementary review area.

TABLE 4-2
HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
Education Development Charges Submission 2024
Forms B/C - Dwelling Unit Summary

PROJECTION OF NET NEW DWELLING UNITS¹

	Year 1 2024/ 2025	Year 2 2025/ 2026	Year 3 2026/ 2027	Year 4 2027/ 2028	Year 5 2028/ 2029	Year 6 2029/ 2030	Year 7 2030/ 2031	Year 8 2031/ 2032	Year 9 2032/ 2033	Year 10 2033/ 2034	Year 11 2034/ 2035	Year 12 2035/ 2036	Year 13 2036/ 2037	Year 14 2037/ 2038	Year 15 2038/ 2039	Total All Units
HWDSB Jurisdiction																
Single & Semi-detached	113	404	384	113	118	126	107	98	95	526	294	346	481	602	532	4,339
Multiples	427	1,006	1,242	601	773	493	811	597	551	693	860	854	300	20	21	9,249
Apartments	3,970	3,100	2,882	3,899	3,626	3,896	3,492	3,965	4,015	3,433	3,512	3,460	2,920	3,086	3,156	52,412
Total	4,510	4,510	4,508	4,613	4,517	4,515	4,410	4,660	4,661	4,652	4,666	4,660	3,701	3,708	3,709	66,000
PE01 - Flamborough & Waterdown																
Single & Semi-detached	-	6	-	-	23	23	24	24	-	3	2	20	8	68	73	274
Multiples	-	90	91	-	-	-	52	-	42	93	112	51	-	-	-	531
Apartments	201	202	202	385	385	354	354	376	259	259	184	184	184	184	-	3,713
Total	201	298	293	385	408	377	430	400	301	355	298	255	192	252	73	4,518
PE02 - Ancaster, Dundas & Mount Hope																
Single & Semi-detached	-	6	7	20	24	19	14	14	15	103	32	83	47	66	67	517
Multiples	34	37	37	40	48	11	147	136	4	5	-	-	-	-	-	499
Apartments	-	170	-	-	-	-	189	21	61	61	40	41	-	-	-	583
Total	34	213	44	60	72	30	350	171	80	169	72	124	47	66	67	1,599
PE03 - Glanbrook & Binbrook																
Single & Semi-detached	80	80	80	-	-	-	-	-	-	90	92	75	92	181	134	904
Multiples	177	186	207	20	-	-	-	-	-	204	253	253	94	-	-	1,394
Apartments	-	-	-	-	111	-	-	-	-	225	-	60	-	105	-	501
Total	257	266	287	20	111	-	-	-	225	294	345	388	186	286	134	2,799
PE04A - Hamilton Mountain West																
Single & Semi-detached	-	140	122	44	-	-	12	-	-	36	1	-	70	71	65	561
Multiples	12	122	122	77	78	20	38	163	20	32	162	234	52	12	12	1,156
Apartments	418	103	103	232	233	333	724	440	459	273	-	-	95	95	454	3,962
Total	430	365	347	353	311	353	774	603	479	341	163	234	217	178	531	5,679
PE04B - Hamilton Mountain Center																
Single & Semi-detached	-	13	4	-	-	-	-	-	-	12	42	31	12	21	20	155
Multiples	-	68	68	-	198	198	-	50	10	121	122	51	51	8	9	954
Apartments	261	-	-	-	-	-	206	509	641	434	329	536	694	268	268	4,146
Total	261	81	72	-	198	198	206	559	651	567	493	618	757	297	297	5,255
PE04C - Hamilton Mountain East																
Single & Semi-detached	25	40	16	16	45	28	-	4	24	18	-	-	22	21	18	277
Multiples	7	27	21	9	9	-	-	83	26	21	21	21	-	-	-	245
Apartments	-	-	124	-	-	149	149	344	439	220	97	97	-	-	-	1,619
Total	32	67	161	25	54	177	149	431	489	259	118	118	22	21	18	2,141
PE05 - Lower Hamilton Central & West																
Single & Semi-detached	-	-	-	-	-	-	-	-	-	29	-	-	5	19	15	68
Multiples	-	7	7	-	3	10	143	-	260	-	12	-	-	-	-	442
Apartments	1,939	1,025	1,027	1,377	1,349	1,686	1,292	1,500	800	751	1,367	1,129	1,132	1,859	1,337	19,570
Total	1,939	1,032	1,034	1,377	1,352	1,696	1,435	1,500	1,060	780	1,379	1,129	1,137	1,878	1,352	20,080
PE06 - Lower Hamilton East & Lower Stoney Creek																
Single & Semi-detached	-	4	4	-	-	-	-	-	-	16	28	28	35	6	6	127
Multiples	100	173	178	79	48	49	180	-	-	-	-	36	36	-	-	879
Apartments	709	1,302	1,020	1,376	1,224	1,251	271	674	969	848	888	401	343	1,097	1,264	12,644
Total	809	1,479	1,202	1,455	1,272	1,300	451	271	674	985	876	952	472	349	1,103	13,650
PE07 - Winona																
Single & Semi-detached	-	-	-	-	26	56	57	56	56	65	-	-	37	54	58	465
Multiples	97	147	229	148	301	135	251	165	87	8	8	8	-	-	-	1,584
Apartments	200	200	200	324	324	123	123	123	273	273	273	150	-	-	-	2,586
Total	297	347	429	472	651	314	431	344	416	346	281	158	37	54	58	4,635
PE08 - Upper Stoney Creek																
Single & Semi-detached	8	115	151	33	-	-	-	-	-	154	97	109	153	95	76	991
Multiples	-	149	282	228	88	70	-	-	102	209	170	200	67	-	-	1,565
Apartments	242	98	206	205	-	-	184	381	184	193	374	375	414	232	-	3,088
Total	250	362	639	466	88	70	184	381	286	556	641	684	634	327	76	5,644

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

Grand Total Gross New Units in By-Law Area	66,000
Less: Statutorily Exempt Units in By-Law Area	-5,412
Total Net New Units in By-Law Area	60,588

4.4 Non-Residential Growth Forecast and Form D

The non-residential growth forecast (Tables 4-3 and 4-4) indicates that a total of 30,728,757 square feet of non-residential gross floor area (GFA) space and additions is anticipated within the Board’s jurisdiction over the 15-year forecast period. Industrial and institutional additions, municipal and school board properties, which are exempt under the legislation, along with additional non-residential exemptions enacted by the province in 2019, are expected to total 9,463,486 square feet of GFA over the same forecast period. Therefore, an education development charge by-law can be applied against a net of 21,265,271 square feet of net gross floor area. The forecast for the post 2033 period was interpolated and based on the following employment density assumptions taken from the City’s December, 2023 DC study:

- Commercial – region-wide 400 sq ft per employee
- Industrial – region-wide 1,200 sq ft per employee
- Institutional – region-wide 680 sq ft per employee

Additional statutory exemptions have been added to the legislation since the Board’s EDC by-law was adopted in 2019.

As of November 8, 2019, non-residential statutory exemptions include:

- h. land owned by, and used for the purposes of, a board or a municipality
- i. the construction or erection of any building or structure, or addition/alteration to a building or structure¹ in the case of:
 - a. private schools, the owner of a college of applied arts and technology established under the *Ontario Colleges of Applied Arts and Technology Act, 2002*
 - b. a long-term care home, as defined in the *Long-Term Care Homes Act, 2007*
 - c. a retirement home as defined in the *Retirement Homes Act, 2010*
 - d. a hospice or other facility that provides palliative care services
 - e. a child care centre, as defined in the *Child Care and Early Years Act, 2014*
 - f. a memorial homes, clubhouse or athletic grounds owned by the Royal Canadian Legion
 - g. a university that receives regular and ongoing operating funds from the Government of Ontario for the purposes of post-secondary education
 - h. the owner of an Indigenous Institute prescribed for the purposes of section 6 of the *Indigenous Institutes Act, 2017*, - the creation of post-secondary education facilities

¹ If only a portion of the building or structure is to be used for the any of the purposes listed below, only that portion of the building, structure, addition or alteration is exempt from an education development charge.

- i. expansions to industrial buildings (gross floor area)
- j. 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

Table 4-3

Non-Residential Forecast of Net Gross Floor Area

Forecast of Space Construction, New and Additions (sq ft)					
	Year	Industrial	Commercial	Institutional	Total
Projected (based on May, 2017 DC Forecast)	2024/2025	718,800	494,400	348,160	1,561,360
	2025/2026	718,800	494,400	348,160	1,561,360
	2026/2027	718,800	494,400	348,160	1,561,360
	2027/2028	718,800	494,400	348,160	1,561,360
	2028/2029	718,800	494,400	348,160	1,561,360
	2029/2030	718,800	494,400	348,160	1,561,360
	2030/2031	718,800	494,400	348,160	1,561,360
	2031/2032	718,800	494,400	348,160	1,561,360
	2032/2033	718,800	494,400	348,160	1,561,360
	2033/2034	1,003,400	504,740	401,237	1,909,377
	2034/2035	1,288,000	515,081	454,313	2,257,394
	2035/2036	1,572,600	525,421	507,390	2,605,411
	2036/2037	1,857,200	535,762	560,466	2,953,428
	2037/2038	2,141,800	546,102	613,543	3,301,445
	2038/2039	2,426,400	556,443	666,619	3,649,462
Average Annual		1,117,200	508,900	422,500	2,048,600
TOTAL NEW SPACE (SQ FT)		16,758,600	7,633,149	6,337,008	30,728,757
As a % of GFA		54.5%	24.8%	20.6%	100.0%
Less Statutorily Exempt GFA		5,027,580	0	4,435,906	9,463,486
Net Projected GFA		11,731,020	7,633,149	1,901,102	21,265,271

Source: 2City of Hamilton Development Charges Background Study prepared by Watson & Associates Economists Ltd. And dated December 21, 2023 for the 2023-2033 period.

Post 2033 non-res GFA (based on 1200 sq ft industrial; 400 commercial and 680 institutional sq ft per employee) and 2051 forecast by traffic zone provided by the City of Hamilton on December 14, 2023

Table 4-4 summarizes Form D of the EDC Submission:

TABLE 4-4
HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
Education Development Charges Submission 2024
Form D - Non-Residential Development

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

Total Estimated Non-Residential Board-Determined Gross Floor Area to be Constructed Over 15 Years From Date of By-Law Passage	30,728,757
Less: Board-Determined Gross Floor Area From Exempt Development	9,463,486
Net Estimated Board-Determined Gross Floor Area	21,265,271

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Chapter 5 - DEMOGRAPHIC TRENDS AND FUTURE ENROLMENT EXPECTATIONS

5.1 Demographic and Enrolment Trends

The Hamilton-Wentworth District School Board provides exemplary education services within the City of Hamilton. During the 2022/23 school year, the HWDSB had a total enrolment of 51,542 students (based on average daily enrolment).

5.1.1 Overview

The determination of growth-related land needs over a 15-year forecast period begins with undertaking by school and by grade enrolment projections for the Board. The analysis set out herein examines both historic demographic and enrolment trends within the Board's jurisdiction. The determination of 15-year enrolment projections uses a spatial matching of historical HWDSB student data with MPAC housing data (i.e. by period of occupancy), in order to derive the number of HWDSB pupils to be generated by new housing development and to determine appropriate by school and by grade enrolments.

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, at any point in time. That is, school-age population trends typically experience 'cycles'.

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. On the other hand, it is possible to experience an increase in children per household in high-rise developments due to reduced housing affordability.

How have *migrations trends* changed, as a whole and by age cohort? How has the economy affected the in-migration and out-migration of female 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 and apportionment shares? What is the *religious affiliation of the migrant population*? It should be noted that religion is only asked every second Census undertaking.

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 family formation later on in life and, in turn, having fewer children overall. Higher interest rates and reduced availability of affordable housing will have a negative impact on births.

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

- a. 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?
- b. Have changes in *program delivery* affected the Board's enrolment)?
- c. How has the Board's *share of elementary/secondary enrolment* changed vis-à-vis the coterminous boards, as well as, private school and secular enrolment?

5.1.2 Population and Housing

Statistics Canada released the population and dwelling unit data related to the 2021 Census undertaking. This data provides insights into demographic shifts by dissemination areas¹ for the jurisdiction as a whole. This information is the primary source of the school and pre-school age population trends discussed herein as they relate to the Hamilton-Wentworth Boards' jurisdiction.

Table 5-1 compares the pre-school and school age population between 2011-2016 and 2016-2021 Census periods, illustrating the changing trends which will impact future enrolment growth for the Board. The information is provided for the ten (10) HWDSB Review Areas, which overlap the 4 HWCSB Review Areas.

As shown in the table, from a jurisdiction-wide perspective, the pre-school age population (ages 0-3) increased by 3,205 persons or just over 16% between 2011 and 2021. The elementary school age population (ages 4-13) increased by 8,540 persons or 16.0% from 2011 to 2021. From 2011 to 2021 the secondary school age population (ages 14-17) decreased by 875 persons or just under 3.5%. Within the pre-school population category, the highest increase 2011 to 2021 occurred in Upper Stoney Creek, with the largest decrease in Hamilton Mountain East. Within the elementary school aged population category there was an increase of more than 2,000 persons between 2011 and 2021 in both Upper Stoney Creek and the areas of Glanbrook & Binbrook. An increase of more than 380 secondary school age persons occurred within: PE02, PE03, PE07, PE08. Finally, the largest increase in females of primary child bearing age (25-39 years) occurred in Lower Hamilton Central & West.

The highest number of births in the 2021 Census year occurred in Lower Hamilton Central & West.

¹ A dissemination area is Census geography generally 400 to 700 persons in size.

**Table 5-1
City of Hamilton Change in Pre-school & School Age Population by HWDSB Review Area (Census 2011 to 2021)**

	2011 Census				2016 Census				2021 Census				Census 2011 - 2021 Change Females of Primary Child Bearing Age		
	Pre School Age 0-3 years	Elementary School Age 4- 13 years	Secondary School Age 14-17 years	Females of Primary Child Bearing Age 25-39 years	Pre School Age 0-3 years	Elementary School Age 4- 13 years	Secondary School Age 14-17 years	Females of Primary Child Bearing Age 25-39 years	Pre School Age 0-3 years	Elementary School Age 4- 13 years	Secondary School Age 14-17 years	Females of Primary Child Bearing Age 25-39 years		Census 2011- 2021 Change 0 to 3 years	Census 2011- 2021 Change 4-13 years
HWDSB Review Area															
PE/01	1,265	4,140	2,105	2,270	1,250	3,840	1,840	2,350	2,075	5,620	2,095	4,070	810	1,480	-10
	City of Hamilton														
	Flamborough & Waterdown														
	Ancaster, Dundas & Mount														
PE/02	2,265	7,260	3,540	4,655	2,620	8,385	3,630	5,165	2,535	8,455	3,920	5,980	270	1,195	380
PE/03	295	635	225	500	945	2,135	495	1,705	875	2,670	800	1,660	580	2,035	575
PE/04A	2,040	6,075	3,085	4,430	2,115	6,305	2,895	4,655	2,075	6,075	2,875	5,335	35	0	-210
PE/04B	1,530	3,665	1,775	3,510	1,525	3,685	1,475	3,680	1,640	4,230	1,620	4,590	110	565	-155
PE/04C	2,595	7,940	3,980	5,920	2,645	7,445	3,385	6,250	2,505	7,365	3,170	6,645	-90	-575	-810
	Lower Hamilton Central & West														
PE/05	4,970	10,425	4,785	12,595	4,675	10,150	4,005	13,415	4,975	10,780	3,800	16,980	5	355	-985
	Lower Hamilton East & Lower Stoney Creek														
PE/06	3,345	8,825	4,385	7,750	3,370	8,295	3,535	7,750	3,520	8,675	3,460	9,065	175	-150	-925
PE/07	485	1,215	435	875	430	1,365	535	930	600	1,980	835	1,395	115	765	400
PE/08	1,125	3,285	1,495	2,395	1,480	3,890	1,840	3,095	2,320	6,155	2,360	4,875	1,195	2,870	865
Total City of Hamilton	19,915	53,465	25,810	44,900	21,055	55,495	23,635	48,995	23,120	62,005	24,935	60,595	3,205	8,540	-875
													16.1%	16.0%	-3.4%
															35.0%

In terms of future shifts in age structures within the jurisdictional neighbourhoods, the percentage of the neighbourhood population over the age of 65 years, as a % of the total population, is one of the indicators of future re-gentrification and re-occupancy of dwellings. As to the impact on future HWDSB enrolment, that is something to be monitored over time.

5.1.3 Enrolment Overview and Apportionment

Historical elementary and secondary enrolments (2014/15 to 2023/24 actual enrolments) for the HWDSB and HWCDSB have been summarized in Table 5-2. This table summarizes the change in elementary and secondary enrolment for each Board over this time period. The information is taken from the Ministry-reported enrolments and found in the annual Funding Projections report for each Ontario school board (except for 2022/23 and 2023/24 enrolments which were provided by each board).

On the elementary panel, the HWDSB has gained in apportionment share to the HWCDSB since 2014/15. On the secondary panel, the HWDSB lost apportionment share to the HWCDSB each year between 2014/14 to 2019/20, but has experienced an improvement in apportionment share since.

5.2 15-year Student Enrolment Projections and Projections of Pupil Accommodation Needs

The end of this chapter summarizes the elementary and secondary 15-year EDC 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, which is consistent with industry standards, follows a retention rate approach to determine how the existing pupils of the Board (i.e. pupils residing in existing housing within the Board’s jurisdiction, as well as any pupils who reside outside of the Board’s jurisdiction but attend schools of the Board) would move through each grade and transition from the elementary to the secondary panel, including any shifts in apportionment moving from elementary to secondary school programs. 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 and subsequently combined to determine total projected enrolment. The methodological approach to each element is examined in depth below.

Table 5-2
HWDSB & HWCDSB - Historical Apportionment Shares

	HWDSB Elementary Panel	HWCDSB Elementary Panel	TOTALS	HWDSB Elementary Panel	HWCDSB Elementary Panel	TOTALS
2014/15	34,336	18,699	53,035	64.7%	35.3%	100.0%
2015/16	34,346	18,545	52,891	64.9%	35.1%	100.0%
2016/17	35,146	18,544	53,690	65.5%	34.5%	100.0%
2017/18	35,531	18,739	54,270	65.5%	34.5%	100.0%
2018/19	35,949	18,881	54,830	65.6%	34.4%	100.0%
2019/20	36,618	19,193	55,811	65.6%	34.4%	100.0%
2020/21	35,280	19,025	54,305	65.0%	35.0%	100.0%
2021/22	36,144	19,056	55,200	65.5%	34.5%	100.0%
2022/23	37,044	19,115	56,159	66.0%	34.0%	100.0%
2023/24	37,689	19,567	57,256	65.8%	34.2%	100.0%
2014/15- 2023/24	65.4%	34.6%	100.0%			
Projected 2023/24	65.8%	34.2%	100.0%			
	HWDSB Secondary Panel	HWCDSB Secondary Panel	TOTALS	HWDSB Secondary Panel	HWCDSB Secondary Panel	TOTALS
2014/15	14,801	9,763	24,564	60.3%	39.7%	100.0%
2015/16	14,391	9,709	24,100	59.7%	40.3%	100.0%
2016/17	13,815	9,775	23,590	58.6%	41.4%	100.0%
2017/18	13,654	9,869	23,523	58.0%	42.0%	100.0%
2018/19	13,388	10,094	23,482	57.0%	43.0%	100.0%
2019/20	13,253	10,227	23,480	56.4%	43.6%	100.0%
2020/21	13,314	10,231	23,545	56.5%	43.5%	100.0%
2021/22	13,567	10,207	23,774	57.1%	42.9%	100.0%
2022/23	14,498	10,630	25,128	57.7%	42.3%	100.0%
2023/24	15,010	11,385	26,395	56.9%	43.1%	100.0%
2014/15- 2023/24	57.8%	42.2%	100.0%			
Projected 2023/24	56.9%	43.1%	100.0%			

Note: 2022/23 & 2023/24 taken from Board-submitted data

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. Existing community projections may also include some pupils who live outside of the Board's jurisdiction, but attend schools of the Board.

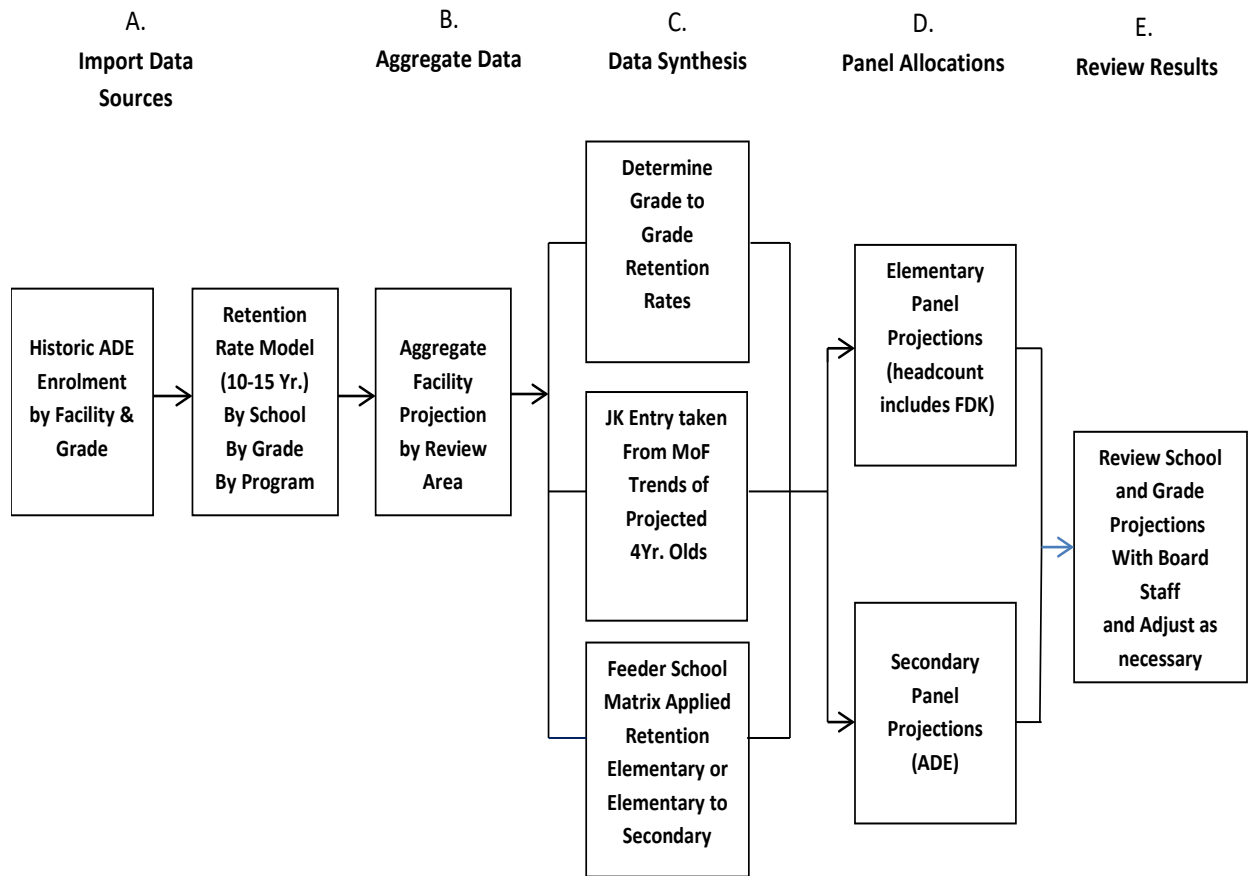
The key components of the existing community projection model are outlined in Figure 1.

1. Enrolment projections disaggregated by sub-geography (i.e., review areas and within review areas) and by school.
2. Historic average daily enrolment by school, by grade and by program. 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. Finally,

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



3. 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 Boards' share of enrolment at any particular school, or more recent retention rates of any school or particular grade?
4. Feeder school retentions for each elementary and secondary school -- this includes pupils feeding into specialized programs (e.g., French Immersion, specialized programs, etc. where applicable) and from elementary schools 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 coterminous board's secondary school).
5. Historical enrolment anomalies and the ability to document unusual shifts in enrolment at any individual school due to changes in program, staffing, transportation policies, capital improvements, etc.

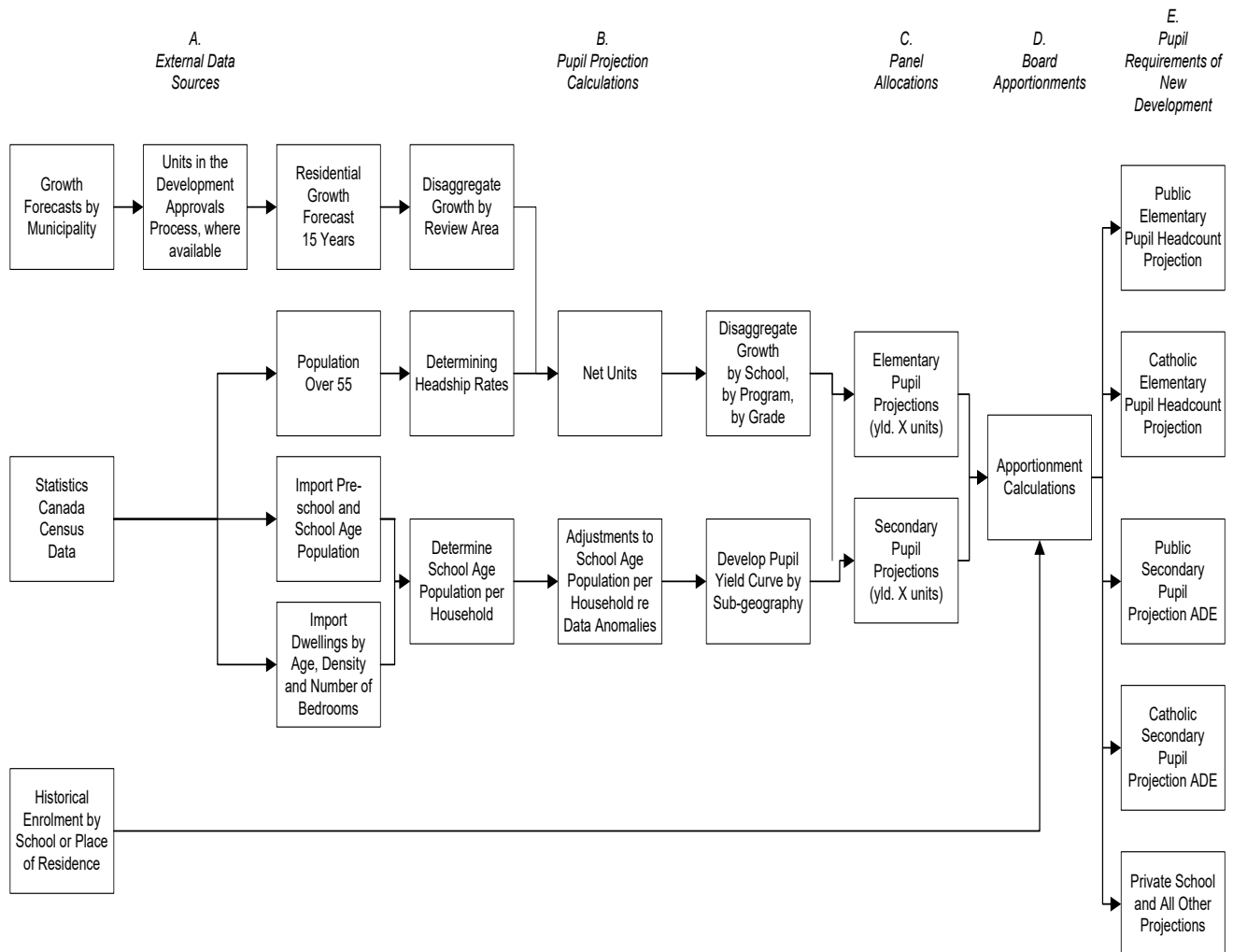
Requirements of New Development

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 resident-area schools.

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

1. Units in the development approvals process – a spatial matching of the development forecast by development applications and municipal address, as well as Board-approved elementary attendance boundaries, is used as one of the considerations in deriving the detailed fifteen-year housing forecast by school catchment area, by unit type and for the majority of the high-rise development applications - the number of proposed bedrooms per unit.
2. City growth forecast – the City of Hamilton no urban boundary projections to 2041, and by traffic zone, was used as the basis for the jurisdiction-wide 15-year control totals, 5-year increments and density mix.
3. Pupil yield cycles derived from historical HWDSB student data spatially matched to MPAC housing data by period of housing construction over the last 15-years (to derive 15-year pupil yield cycles), by density type and by Review Area. The pupil yields cycles were subsequently applied to each of the development application comprising the housing forecast by school.
4. Age-specific Ministry of Finance (MoF) population projections for the area were reviewed and the historical HWDSB apportionment share applied to determine the order of magnitude of projected enrolment increases, consistent with fertility and net migration assumptions underlying the MoF projections. The total Requirements of New Development plus Requirements of the Existing Community were peer-reviewed against the MoF projections. Although it is noted that the MoF projections are more than 7% higher than the projected enrolment increases for the coterminous Hamilton boards, over the forecast period.
5. The draft student enrolment projections were reviewed with Board staff and compared to internal enrolment projections and assumptions respecting apportionments shares, retention rate and phasing of residential development.
6. Figure 2 outlines the methodological approach in assessing the Requirements of New Development.

FIGURE 2
PUPIL PLACE REQUIREMENTS OF NEW DEVELOPMENT: CONCEPTUAL SCHEMATIC



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 suburban 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 is important to note however, the length of time taken to secure building permit approvals; ensure that local infrastructure is available to accommodate the development; demand for new residential development and economic conditions affecting the timing of development, can all extend the length of the pupil yield cycle.

It should be noted that new communities are generally comprised of:

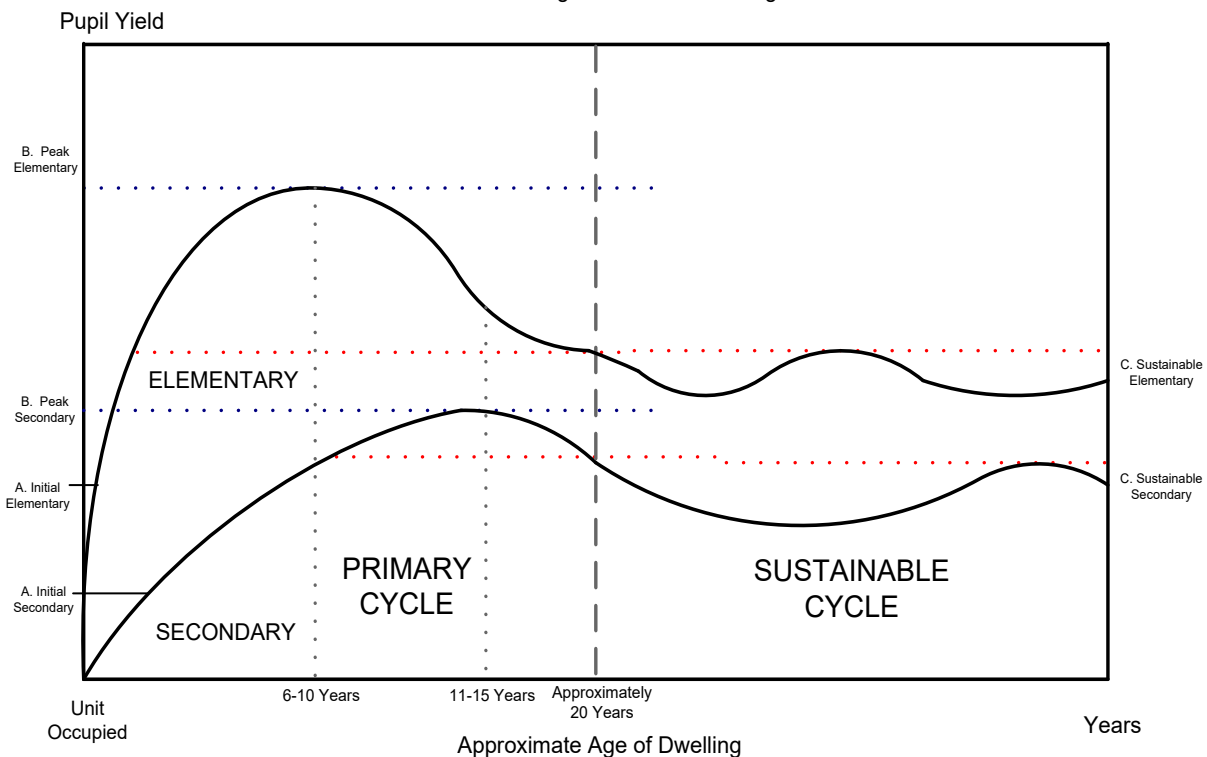
- Units constructed and occupied at different times;

- Development of varying densities (low, medium or high, and increased mixed-use development);
- Transit-oriented developments (TOCs) and MTSAs;
- There are particular types of units with low or no yield occupancies (e.g., adult lifestyle, permanent 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 fewer children (as witnessed by declining fertility rates). More recent higher-interest mortgage rates will also have the potential to delay family formation.

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



“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 pupil generation 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.

Total Student Enrolment Projections

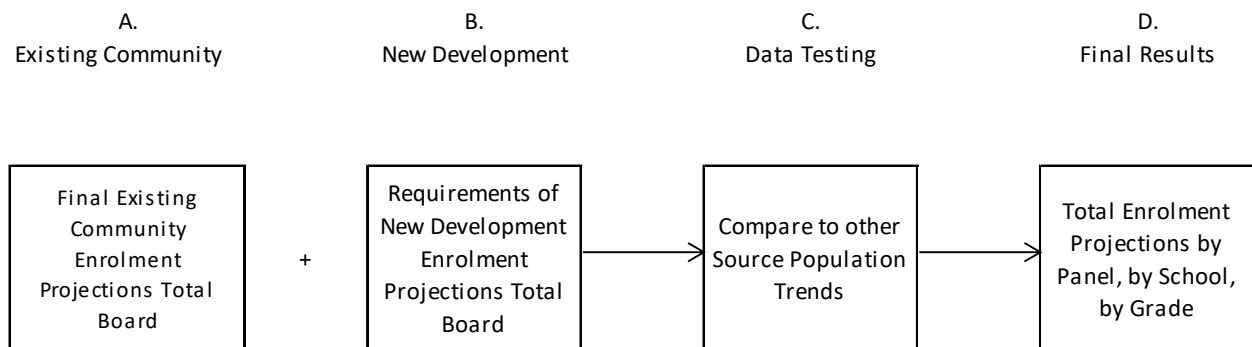
The second phase, the sustainable yield cycle for both the elementary and secondary panels appears to maintain similar, but flatter, peaks and valleys. However, the peak of the sustainable cycle is considerably lower than the primary peak for the community.

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.

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. Moreover, there is a need to track the regentrification of more established neighbourhoods.

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 15-year EDC enrolment, for the HWDSB, are provided in Table 5-3 and for the elementary and secondary panels. The total EDC elementary enrolment projections indicate that by the end of the 15-year forecast period, the Board will have a total enrolment of 43,369 students for an increase of 5,680 students from the 2023/24 enrolment of 37,689. The Board is expected to experience an increase of about 1,255 students in the existing community, which is projected to be enhanced by an additional 4,426 pupils from new housing development, which is an overall pupil yield of 0.0671.

On the secondary panel, the HWDSB EDC projections forecast an increase of 274 students in the existing community and 1,387 additional students to come from new development over the next 15 years. This results in a total projected year 15 enrolment of 16,672 students on the secondary panel, an increase of 1,662 students from the 2023/24 enrolment. The overall secondary pupil yield is 0.021

Table 5-3
HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
 Historical and Projected Enrolment

	Current	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2023/ 2024	2024/ 2025	2025/ 2026	2026/ 2027	2027/ 2028	2028/ 2029	2029/ 2030	2030/ 2031	2031/ 2032	2032/ 2033	2033/ 2034	2034/ 2035	2035/ 2036	2036/ 2037	2037/ 2038	2038/ 2039
Elementary Panel																
Existing	37,689	37,678	37,703	37,575	37,510	37,530	37,656	37,724	37,798	37,867	38,010	38,179	38,361	38,555	38,751	38,944
Requirement of New Development		201	623	1,109	1,355	1,648	1,873	2,168	2,418	2,621	3,011	3,367	3,730	3,975	4,198	4,426
Total	37,689	37,879	38,326	38,683	38,865	39,178	39,529	39,892	40,216	40,488	41,021	41,546	42,091	42,531	42,949	43,369

5,680

	Current	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2023/ 2024	2024/ 2025	2025/ 2026	2026/ 2027	2027/ 2028	2028/ 2029	2029/ 2030	2030/ 2031	2031/ 2032	2032/ 2033	2033/ 2034	2034/ 2035	2035/ 2036	2036/ 2037	2037/ 2038	2038/ 2039
Secondary Panel																
Existing	15,010	15,301	15,376	15,411	15,551	15,492	15,522	15,463	15,405	15,399	15,491	15,378	15,333	15,211	15,239	15,284
Requirement of New Development		64	190	332	410	496	562	647	717	785	904	1,017	1,140	1,235	1,314	1,387
Total	15,010	15,365	15,566	15,743	15,961	15,988	16,084	16,111	16,122	16,184	16,395	16,395	16,473	16,446	16,553	16,672

1,662

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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, require 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 (i.e. legislative 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 (unless approved by the Minister of Education as part of an Alternative Project);
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.

The exception to this is:

- (a) land that has already been acquired by the board before February 1, 1998, or
- (b) land in respect of which there is an agreement, entered into before February 1, 1998, under which the board is required to, or has an option to, purchase the land.

Finally, the Regulation specifies the following maximum 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

In some cases, school boards may agree to smaller site sizes where they are situated adjacent to parkland that is partially or wholly available for school program usage (i.e. preferably on an exclusive use basis during the school day). However, municipalities may be reluctant to allow shared usage of parkland. The school board would likely be required to participate in cost sharing responsibilities related to operating costs and risk management. In some instances, Boards may require site sizes in excess of the maximum prescribed above, in that a portion of the school site may be undevelopable (e.g. environmentally sensitive lands, woodlots, etc.). Changes to program offering often translates into larger school buildings footprints, increased playfield space, parking spaces, site access, etc. that would require larger school sites. The EDC legislation deals with the acquisition of school sites exceeding the acreage benchmarks outlined above. School site sizes need to be determined on a site-specific basis and may be more or less than specified in the table above.

6.2 Increased Site Size Requirements

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.” Larger site sizes than specified by the Regulation benchmark may be required to account for changing municipal parking standards and the impact of programs such as full-day Kindergarten and on-site daycare, greater site access needs, playfield space and pens, parking requirements; setbacks related to hydro or pipeline corridors, the potential to accommodate increased portables and a larger building footprint, etc. Where school site sizes include undevelopable table lands or lands that cannot be severed and sold off; or include the requirement for larger site sizes to address program or municipal site plan requirements; the entire site size can be considered EDC-eligible, provided that the appropriate explanation is given in the EDC Background Study report.

The HWDSB has only one (1) projected elementary site that exceeds the acreage standard with a proposed OTG of 500 for a 6-acre site. However, a number of the Board’s proposed school sites are smaller than the maximum specified in the legislation.

6.3 Reduced Site Size Considerations and Acquiring an Interest in Land

The section of the *Education Act* dealing with education development charges was designed, in 1998, to address the acquisition of lands in a greenfields setting – that is: designed to deal with the acquisition of conventional elementary and secondary site sizes in subdivision primarily comprised of ground-related housing development. The Regulation governing EDCs further established a maximum site size at 1.0 acre per 100 elementary pupils and slightly larger school site standards for secondary schools.

The legislative definition of education land costs included:

Costs to acquire land or an interest in land, including a leasehold interest, to be used by the Board to provide pupil accommodation; but excludes the costs of any building to be used to provide pupil accommodation.

As such, the costs related to constructing a school building could not be funded from the imposition of education development charges. However, in 2018, underground parking costs were included as EDC-eligible costs, where it could be demonstrated that the cost of the underground parking was less than the cost of surface parking.

Legislative changes in November 2019 incorporating Alternative Projects afforded school boards with the flexibility to allocate EDC funds to the acquisition of land; the acquisition of an interest in land (a type of Alternative Project) or a leasehold interest as an alternative to the traditional land purchase process for school sites. An Alternative Project requires the approval of the Minister of Education and must have associated costs that are lower than the cost to acquire a conventional school site. Alternative Projects are not to replace costs that are supported by education funding

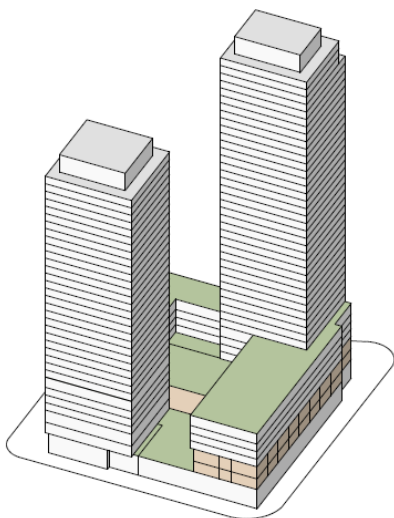
sources (e.g., operating and facility renewal funds). It is noted that an ‘interest in land’ is not defined in the *Education Act*.

One of the challenges in determining whether any particular proposed HWDSB school site would meet the legislative test of an ‘Alternative Project’ is, what constitutes a conventional and what constitutes intensified school site sizes in the City of Hamilton. While ‘maximum’ conventional school site sizes are addressed in section 2 of O. Reg. 20/98 and were based on the assumption of greenfields, ground-related housing development, there is an ongoing need to develop site size standards based on intensified school sites attracting significantly higher density values.

Board staff and the consultants worked with Antec Appraisal Group Inc. who provided conventional (i.e., fee simple) land valuations for each identified growth-related site.

An Alternative Project may involve either the acquisition of land by the school board; or entering into a strata agreement as part of acquiring an interest in land; or entering into a long-term leasehold arrangement (e.g., a secondary school as part of an office tower). Regardless of the form of intensified school site development, Alternative Projects are intended to provide a more cost-effective approach to the provision of growth-related student accommodation needs where the density value of the land is high and the development of the land in question involves a variety of uses (e.g., typically some combination of: residential, commercial, institutional, and /or office development), as opposed to a stand-alone school site. Alternative Projects may include: stand-alone school sites where cost savings are achieved by reducing the site size, or incorporating underground parking for instance. Alternative Projects can also be schools built as part of, but adjacent to, other portions of the development where the school may acquire or lease the land outright; and finally, as schools built as part of podium developments and integrated within vertical residential or non-residential towers. In the latter case, the expectation is that the school board is typically acquiring an interest in the land through a strata agreement.

A podium school is a school constructed at the base of a high-rise development (residential, commercial or other-institutional tower) as shown below.



Rendering courtesy of CS&P Architects

In the case of a podium school, the timing of the high-rise development will dictate the timing necessary to fund and construct the school. The development construction timing may not necessarily align with the school board’s student accommodation needs for the area.

6.4 Site Requirements

The site requirements arising from new development in each review area indicate the cumulative number of new pupil places required by Year 15 of the forecast period, and for which there are insufficient permanent pupil places to accommodate all projected students. Additional land for school 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, the acquisition of adjacent property and demolition of existing buildings may be required in some cases). Even in a greenfield situation, school additions constructed to accommodate enrolment growth may require additional site development (e.g., grading, soil remediation, upgrading utility services, removal of portables, demolition of existing buildings, etc.). 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. Aligning funding, acquisition and site development timing is particularly challenging in an intensified urban development environment.

6.5 Land Valuation Approach for School Sites

The Hamilton-Wentworth school boards retained the services of the firm Antec Appraisal Group Inc. 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:

“Estimate the benchmark land values for residential development land in the designated areas (Upper Stoney Creek and Winona) for the renewal of their Education development Charge By-laws. The appraisal approach is based on fee simple interest, defined as the highest form of real property ownership, an absolute fee without limitations to a particular class of heirs, however subject to the restriction of eminent domain, escheat, police power and taxation.”

All values were provided on a per acre basis, and the effective date of the value estimate is February 22, 2024. The appraisals were based on elementary site sizes of 5-7 acres. Zoning is assumed to be either residential or institutional. There is no assumption of prospective value recognizing the potential for increased density approvals.

Land values for the Fruitland-Winona area were based on highest and best use of the subject property, as if vacant, and zoned for medium density development. The Direct Comparison Approach concluded a valuation of \$2,750,000 per acre with a 5% annual inflator.

Land values for the Upper Stoney Creek area were based on a Direct Comparison Approach and concluded \$2,750,00 per acre with a 5% annual inflator.

6.6 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. The Appraisers recommended an escalation factor of 5.0% per annum for the purposes of projecting the land values over the five-year by-law period. However, for the purposes of determining the potential unfunded net education land costs the escalation factor has been applied over the entire 15-year forecast period. Doing so, does not affect the EDC by-law rates as they are derived from the legislative ‘cap’.

6.7 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, in a conventional land acquisition situation, will provide:

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

in consideration of being paid “fair market value” for the land. Where un-serviced land is acquired by the board, the cost to “provide services to the land” is properly included in the education development charge. In the case of redevelopment sites, many will require extensive soils remediation, potential demolition of existing buildings on the site, servicing infrastructure that needs replacement due to age (e.g., water services, sewer services, gas and utilities, transformers, etc.), on-site storm water management, off-site sidewalk and traffic upgrades, road service remediation and service crossing requirements, often as municipal site development requirements.

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. This is the second source of funding. 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.”

The capital construction benchmarks are considerably less than is required to provide services to a school site in order to build a building or buildings to provide pupil accommodation. Further, there can be a delay in receiving approved capital funds from the province, which requires the Board to interim finance site preparation and school construction costs.

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, a list (although by no means an exhaustive list) of EDC “eligible” site preparation/ development costs in a greenfields situation has been determined.

EDC eligible site preparation/development costs related to conventional school site acquisition can 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.

In the case of acquiring a strata interest to meet growth-related student accommodation needs, the costs of preparing the development property so that a building or buildings may be built on the property, are included in the development construction costs, so as not to apply an assumption of land escalation to the values.

6.7.1 Conclusions on Average Site Preparation/Development Costs

The Board concluded that an average of \$201,087 per acre for both elementary and secondary school sites is reasonable based on a combination of average costs expended by both the HWDSB and the HWCDSB actual costs. Given the need to predict the unfunded net education land costs, the land acquisition escalation factor is applied to the entire forecast period.

A reduced escalation factor of 2.75% per annum for site preparation/development costs has been applied, based on the Statistics Canada Quarterly Construction Price Index for Toronto area which is 6%. Site preparation/development costs are escalated annually over the fifteen-year forecast period.

The Form Gs of the EDC Submission, set out in Appendix A, outline the assumed cost per acre (expressed in 2024 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.

TABLE 6-1
HAMILTON-WENTWORTH DSB and HAMILTON-WENTWORTH CATHOLIC DSB

AVERAGE SITE PREPARATION COSTS PER ACRE

	Current Review Area Reference	EDC Eligible Site Name	Address	Year Site Acquired	Site Size in acres	Net Site Preparation Costs to Date	Net Site Preparation Costs Per Acre	Net Site Preparation Costs per Acre 2024\$	Total Site Preparation Costs 2024\$
1.	CE01	St. Thomas the Apostle CES, (East Waterdown)	170 Skinner Rd., Waterdown L8B 1C7	2012	5.89	\$ 1,637,092	\$ 277,944.31	\$ 395,477.33	\$ 2,329,361.45
2.	CE02	Our Lady of Hope (New Binbrook)	400 Pumpkin Pass, Binbrook L0R 1C0	2019	6.02	\$ 1,108,976	\$ 184,215.28	\$ 216,778.72	\$ 1,305,007.87
3.	CE02	Our Lady of the Assumption (Summit Park), Binbrook	103 Fletcher Rd., Hannon L0R 1P0	2017	5.26	\$ 862,849	\$ 164,039.73	\$ 203,799.78	\$ 1,071,986.82
4.	CE02	St. Matthew CES (Binbrook #1)	200 Windwood Drive, Binbrook L0R 1C0	2009	4.97	\$ 416,076	\$ 83,717.51	\$ 129,218.76	\$ 642,217.23
5.	CE03	Holy Name of Jesus CES, Hamilton	181 Belmont Avenue, Hamilton L8L 7M5	2011	1.61	\$ 104,800	\$ 65,093.17	\$ 95,165.83	\$ 153,216.98
6.	CE03	Immaculate Heart of Mary, Lower Stoney Creek	190 Glover Rd., Hamilton L8E 1A0	2005	13.32	\$ 589,257	\$ 44,238.51	\$ 76,109.20	\$ 1,013,774.50
7.	CE03	St. Gabriel CES, Winona	1361 Barton St., Stoney Creek L8E 5L1	2015	5.73	\$ 1,210,818	\$ 211,312.04	\$ 277,167.66	\$ 1,588,170.68
8.	CS01	Bishop Ryan CSS	1824 Rymal Rd. East, Hamilton L0R 1P0	2013	17.92	\$ 583,828	\$ 32,579.69	\$ 45,115.82	\$ 808,475.54
9.	CS01	Bishop Tonnas CSS	100 Panabaker Dr., Ancaster L9G 5E3	2014	18.66	\$ 360,276	\$ 19,307.40	\$ 26,020.99	\$ 485,551.69
10.	PE02	Tiffany Hills ES	255 Raymond Rd., Ancaster L9K 0H8	2013	6.25	\$ 1,277,876	\$ 204,460.16	\$ 283,133.11	\$ 1,769,581.95
11.	PE08	Shannen Koostachin	110 Bellagio Ave., Hannon L0R 1P0	2014	8.04	\$ 807,463	\$ 100,430.72	\$ 135,352.64	\$ 1,088,235.19
12.	PS03	Nora Frances Henderson Secondary	1770 Upper Sherman Ave., Hamilton L8N 3L1	2017	15.00	\$ 7,724,342	\$ 514,956.13	\$ 639,771.49	\$ 9,596,572.28
TOTALS					108.67	\$ 16,683,653	\$ 153,526		\$ 21,852,152.18

Value to be Included in 2024 EDC Submission

\$ 201,087

Chapter 7 - -EDUCATION DEVELOPMENT CHARGE 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 forwarded to the Ministry of Education and found in Appendix A.

7.1 Growth Forecast Assumptions

The net education land costs and EDC calculations for the Board were based on the following forecast of net new dwelling units for the 2024/25 to 2038/39 period, as detailed in Chapter 4 of this report:

RESIDENTIAL:

New Units	66,000
Average units per annum	4,400
Net new Units	60,588

NON-RESIDENTIAL:

The forecast of non-residential (includes commercial, industrial and institutional development) building permit value over the 2024/25 to 2038/39 period, as detailed in Chapter 4 of this report, is summarized as follows:

Net Gross Floor Area (GFA)	21,265,271 square feet
Average annual GFA	1,417,685 square feet

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 the Review Area Form Fs in Appendix A 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 a spatial matching of HWDSB student data and MPAC housing data.

TABLE 7-1

TABLE 7-1
HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
Education Development Charges Submission 2024
Elementary Panel
 2024 Weighted Blended Pupil Yields

Review Area	SINGLE and SEMI-DETACHED	MEDIUM DENSITY	APARTMENTS (includes purpose-built seniors housing and student housing)	TOTAL UNITS	SINGLE and SEMI-DETACHED	MEDIUM DENSITY	APARTMENTS (includes purpose-built seniors housing and student housing)	TOTAL UNITS	APARTMENTS (includes purpose-built seniors housing and student housing)	TOTAL UNITS
PE01 - Flamborough & Waterdown	274	531	3,713	4,518	0.3001	0.2110	0.0110	0.0520	0.0110	0.0520
PE02 - Ancaster, Dundas & Mount Hope	517	499	583	1,599	0.3259	0.2533	0.0110	0.1884	0.0110	0.1884
PE03 - Glanbrook & Binbrook	904	1,394	501	2,799	0.3703	0.2860	0.0110	0.2640	0.0110	0.2640
PE04A - Hamilton Mountain West	561	1,156	3,962	5,679	0.2350	0.2460	0.0110	0.0810	0.0110	0.0810
PE04B - Hamilton Mountain Center	155	954	4,146	5,255	0.3100	0.2460	0.0110	0.0625	0.0110	0.0625
PE04C - Hamilton Mountain East	277	245	1,619	2,141	0.3760	0.2460	0.0110	0.0851	0.0110	0.0851
PE05 - Lower Hamilton Central & West	68	442	19,570	20,080	0.2834	0.2220	0.0110	0.0166	0.0110	0.0166
PE06 - Lower Hamilton East & Lower Stoney Creek	127	879	12,644	13,650	0.2600	0.2220	0.0110	0.0269	0.0110	0.0269
PE07 - Winona	465	1,584	2,586	4,635	0.2620	0.3130	0.0110	0.1394	0.0110	0.1394
PE08 - Upper Stoney Creek	991	1,565	3,088	5,644	0.3274	0.3036	0.0110	0.1477	0.0110	0.1477
TOTAL	4,339	9,249	52,412	66,000	0.3153	0.2682	0.0110	0.0671	0.0110	0.0671

Secondary Panel

Review Area	SINGLE and SEMI-DETACHED	MEDIUM DENSITY	APARTMENTS (includes purpose-built seniors housing and student housing)	TOTAL UNITS	SINGLE and SEMI-DETACHED	MEDIUM DENSITY	APARTMENTS (includes purpose-built seniors housing and student housing)	TOTAL UNITS	APARTMENTS (includes purpose-built seniors housing and student housing)	TOTAL UNITS
PS01 - Ancaster, Flamborough, Dundas & Hamilton Mountain West	1,352	2,186	9,349	12,887	0.1018	0.0618	0.0056	0.0252	0.0056	0.0252
PS02 - Lower Hamilton Central & West	63	442	19,570	20,075	0.0986	0.0520	0.0056	0.0069	0.0056	0.0069
PS03 - Glanbrook, Upper Stoney Creek, East Mountain, Lower Hamilton	2,924	6,621	23,493	33,038	0.1064	0.0726	0.0056	0.0279	0.0056	0.0279
Alternative Ed Centre										
TOTAL	4,339	9,249	52,412	66,000	0.1048	0.0691	0.0056	0.0210	0.0056	0.0210

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. Populate each Review Area model with each of the schools having attendance boundaries within the individual Review Area.
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 the Requirements of the Existing Community which is total permanent capacity (net of any temporary leased space or non-operational capacity) of all school facilities in the 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. For schools that will experience a change in school boundaries and are holding pupils to new schools, their existing community enrolment is shown separately as explained below.
4. Distinguish between schools whose existing community enrolment will continue to be impacted by housing development that has previously been constructed and occupied. These schools typically experience increased existing community enrolment and are those for which the school board expects to modify the school's boundaries once additional student accommodation is built. That is - distinguish between schools having new residential development within the school's attendance boundary and for which additional student accommodation will be required, and schools having no relevance to the residential growth area requiring additional pupil accommodation, and having sufficient surplus spaces to accommodate existing enrolment. This determines whether there are any surplus pupil places available and accessible for pupils generated by new development.
5. Determine Net Growth-related Pupil Place Requirements which is the Requirements of New Development plus Year 15 enrolment less the number of available pupil places in existing facilities (OTG capacity).
6. In determining the NGRPP entitlement going forward, account for all additional school capacity previously funded from capital and for which the Board is in the process of assembling the land parcels necessary to create a new school site or school site expansion. The net growth-related pupil place entitlement is subsequently incorporated into the Form G to determine the appropriate net education land costs based on aligning the EDC identified needs with the HWDSB's long-term student accommodation strategies.

In determining the net growth-related land needs, the Board is entitled to remove any OTG capacity that is not considered to be available to serve new development (e.g., surplus space

in areas that are not within the existing/proposed catchment areas of new residential development, leased space, closed non-operational space, temporary holding space, etc.). In this regard, the HWDSB has taken into consideration all permanent and operational capacity that provides regular programs to elementary and secondary students.

Excluding Capacity from the Determination of Accommodation Needs

Section 7(3) of O. Reg. 20/98 enables a school board to exclude any capacity, that in the opinion of the school board is not available to accommodate enrolment growth generated by new housing development. Sections 9 (3 and 4) of the Regulation require the Board to provide an explanation for any capacity exclusions.

Determining Net Growth-related Pupil Place Requirements

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 Hamilton-Wentworth District School Board. More than 44% of the pupils generated by new housing development are to be accommodated in existing schools, including those that have been recently approved and whose school sites have already been funded from the EDC account.

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD			
TABLE 7-2 Summary Determination of Net Growth-Related Pupil Places			
	JK-8	Gr 9-12	TOTALS
OTG Capacity	38,248	18,099	56,347
Projected 2038/2039 Enrolment (Existing Community)	38,944	15,284	54,228
Requirements of New Development 2038/2039 (Headcount Elementary)	4,425	1,387	5,813
Less: NGRPP to be Accommodated in Existing Facilities	(1,759)	(795)	(2,554)
# of NGRPP Included in EDC Rate	2,666	592	3,258

44%

7.4 Approved Capital Cost Per Pupil

Paragraphs 4-10 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. As discussed in more detail in Chapter 6, EDC-eligible costs may include: estimated strata development costs as approved Alternative Projects, including escalation of labour and materials costs; surplus properties to be acquired from coterminous school boards; conventional school site purchases; land escalation costs and site preparation costs, where applicable.
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 to the net education land costs. In estimating the balance in the account, the Board is entitled to account for actual rather than projected growth-related needs.
3. Determine the portion of the charges related to residential development and to non-residential development based on the current EDC by-law proportionate shares
4. Differentiate the residential development charge by unit type if the Board intends to impose a variable residential rate.
5. For each year of the proposed by-law, determine the legislative ‘cap’ rates, ensuring that the ‘capped’ residential and non-residential rates are lower than, or equal to, the calculated rates.

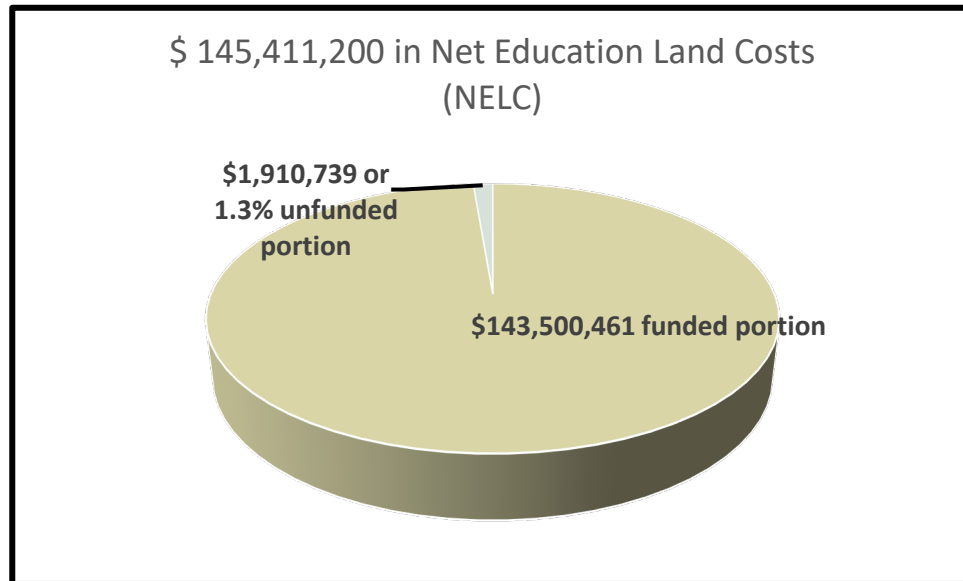
7.5 Net Education Land Costs and Forms E, F and G

The total net education land costs for the Hamilton-Wentworth District School Board, escalation of land, site acquisition costs, site development costs, associated financing costs and study costs, less any EDC account balances, are \$145,411,200 to be recovered from 60,588 “net” new units and 21,265,271 non-residential GFA. A ‘calculated’ residential rate of \$2,040 per dwelling unit and \$1.03 per square feet of non-residential development (based on 85% residential and 15% non-residential shares) would be required to fund the \$145,411,200 in net education land costs, leaving a Year 15 deficit of \$44,165 plus \$1,910,739 in funding shortfall due to the ‘cap’.

Further, it is noted that should the legislative ‘cap’ as currently structured with 5% annual pricing increases remain in place over the entirety of the 15-year forecast period and beyond, the difference between revenues that would have been collected at the ‘calculated’ EDC rates outlined above, and the legislative ‘cap’ rates is an additional shortfall over 15 years.

Should the legislation cap increases continue over the 2024/25 to 2038/39 forecast period, it is anticipated that the imposition of EDCs would recover no more than \$143,500,461 in residential and non-residential collections (assuming the actual building permits match the projected). However, the projected revenue would not cover the additional NGRELC in Year 6, Year 11 and Year 15 as this process moves from one by-law period to another, nor any increased costs beyond the 5% land escalation and 4% site preparation escalation costs. This additional funding shortfall moving forward could equate to \$140.96 million)

The financial considerations, based on 85% residential and 15% non-residential shares is shown below:



EDC Submission (Form E, F and G):

The Review Area sheets set out in Appendix A detail the following information for each elementary and secondary Review Area:

- 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 (Forms E and F);
- the existing schools within each review area; the SFIS # shown in the ECIS; the acreage; the # of temporary spaces (i.e., portables, portapaks and relocatable modules) and the OTG capacity for EDC purposes;
- 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 (i.e. the number of eligible pupil places);

- comments detailing the Board’s capital priorities, and the determination of the number of NGRPP to be funded under the proposed EDC by-law;
- a description of the growth-related site acquisition needs; the number of eligible acres; the anticipated cost per acre; the anticipated strata costs where applicable; the site preparation costs; financing costs and total education land costs (Form G).

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 from June 22, 2013 to August 31, 2023, as well as projected collections to June 30, 2024, for the HWDSB. The collections cover the period which corresponds to implementation of the original EDC by-law and includes collections from residential development, any interest earned on the account to date, any interest expense on account deficits to date, any refunds or overpayments during this time period and any funds returned to the EDC account in respect of the sale of growth-related school sites. The total collections for the period June 22, 2013 to August 31, 2023 are \$58.35 million as shown in Table 7-3.

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. Actual collections for the period September 1, 2023 through June 30, 2024, and during the 2019 through 2023 period, was used as the basis for estimating additional EDC collections to June 30, 2024. Additional revenue of \$4.83 million is assumed prior to successor by-law implementation.

Table 7-4 summarizes the EDC expenditures to date.

When EDC expenditures are taken into consideration, the account balance as of June 30, 2024 is expected to be a deficit of \$6.576 million.

TABLE 7-3 HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD EDC ACCOUNT RECONCILIATION - EDC Collections June 22, 2013 to June 30, 2024 Continuity Statement to Determine Current EDC Account Balance and any Unfunded Financial Obligations		
Date	EDC Collections	Cumulative EDC Collections
<i>EDC Collections June 22, 2013 to August 31, 2013 (less refunds & interest expense, plus accrued interest)</i>	\$ 263,592.00	\$ 263,592.00
<i>EDC Collections September 1, 2013 to August 31, 2014 (less refunds & interest expense, plus accrued interest)</i>	\$ 2,253,809.00	\$ 2,517,401.00
<i>EDC Collections September 1, 2014 to August 31, 2015 (less refunds & interest expense, plus accrued interest)</i>	\$ 3,071,349.00	\$ 5,588,750.00
<i>EDC Collections September 1, 2015 to August 31, 2016 (less refunds & interest expense, plus accrued interest)</i>	\$ 2,299,337.00	\$ 7,888,087.00
<i>EDC Collections September 1, 2016 to August 31, 2017 (less refunds & interest expense, plus accrued interest)</i>	\$ 3,136,956.00	\$ 11,025,043.00
<i>EDC Collections September 1, 2017 to August 31, 2018 (less refunds & interest expense, plus accrued interest)</i>	\$ 2,381,199.00	\$ 13,406,242.00
<i>EDC Collections September 1, 2018 to August 31, 2019 (less refunds & interest expense, plus accrued interest)</i>	\$ 3,530,715.00	\$ 16,936,957.00
<i>EDC Collections September 1, 2019 to August 31, 2020 (less refunds & interest expense, plus accrued interest)</i>	\$ 22,161,000.00	\$ 39,097,957.00
<i>EDC Collections September 1, 2020 to August 31, 2021 (less refunds & interest expense, plus accrued interest)</i>	\$ 6,748,917.00	\$ 45,846,874.00
<i>EDC Collections September 1, 2021 to August 31, 2022 (less refunds & interest expense, plus accrued interest)</i>	\$ 4,219,095.00	\$ 50,065,969.00
<i>EDC Collections September 1, 2022 to August 31, 2023 (less refunds & interest expense, plus accrued interest)</i>	\$ 8,287,669.00	\$ 58,353,638.00
Plus:		
Projected EDC Collections September 1, 2023 - June 30, 2024	\$ 4,830,086.25	\$ 63,183,724.25
Total Net EDC Collections June 22, 2013 to June 30, 2024		\$ 63,183,724.25
Projected EDC Account Balance as of June 30, 2024		-\$6,576,854.08

TABLE 7-4
HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
EDC ACCOUNT RECONCILIATION - EDC Expenditures

	Date	Property Acquired	Property Size (acres)	Review Area Reference	% Growth-related	EDC Expenditures	Cumulative Expenditures
By-law #1 June 22, 2013 to August 31, 2014	EDC Expenditures June 22, 2013 to August 31, 2014						
		Study Costs			100%	\$ 81,565	\$ 81,565
		Other Eligible Costs			100%	\$ 79,874	\$ 161,439
	2012/13 & 2013/14	Tiffany Hills, Ancaster	6.24	PE02	100%	\$ 4,947,687	\$ 5,109,126
	2013/14	Bernie Custis secondary (New North Secondary site, 1055 King Street East, Hamilton)	1.53	PS02	100%	\$ 690,238	\$ 5,799,364
		Adjustments made to Bernie Custis re increased growth-related share from 39.27% to 51.2%			100%	\$ 209,690	\$ 6,009,054
By-law #2 September 1, 2014 to August 31, 2019	EDC Expenditures September 1, 2014 to August 31, 2019						
		Other Eligible Costs			100%	\$ 109,403	\$ 6,118,457
	2014/15 & 2015/16 & 2016/17 & 2017/18 & 2018/19	Bernie Custis secondary (New North Secondary site, 1055 King Street East, Hamilton)	1.53	PS02	100%	\$ 9,142,247	\$ 15,260,704
	2014/15	Tiffany Hills, Ancaster	6.24	PE02	100%	\$ 142,130	\$ 15,402,834
	2014/15	Shannen Koostachin (Summit Park, Hamilton)	8.04	PE08	100%	\$ 5,014,232	\$ 20,417,066
	2015/16	Tiffany Hills, Ancaster	6.24	PE02	100%	\$ 1,051,460	\$ 21,468,526
	2015/16	Shannen Koostachin (Summit Park, Hamilton)	8.04	PE08	100%	\$ 10,430	\$ 21,478,956
	2016/17	Tiffany Hills, Ancaster	6.24	PE02	100%	\$ 237	\$ 21,479,193
	2016/17	Shannen Koostachin (Summit Park, Hamilton)	8.04	PE08	100%	\$ 178,371	\$ 21,657,564
	2016/17	Nora Frances Henderson Secondary (South Secondary - Upper Sherman & Rymal)	15.00	PS03	100%	\$ 18,502,883	\$ 40,160,447
	2017/18	Nora Frances Henderson Secondary (South Secondary - Upper Sherman & Rymal)	15.00	PS03	100%	\$ 730,820	\$ 40,891,267
	2017/18	Shannen Koostachin (Summit Park, Hamilton Mountain East)	8.04	PE08	100%	\$ 388,993	\$ 41,280,260
	2018/19	Nora Frances Henderson Secondary (South Secondary - Upper Sherman & Rymal)	15.00	PS03	100%	\$ 6,300,041	\$ 47,580,301
	2018/19	Shannen Koostachin (Summit Park, Hamilton Mountain East)	8.04	PE08	100%	\$ 229,669	\$ 47,809,970
			Adjustments made to Bernie Custis re increased growth-related share from 39.27% to 51.2%			100.00%	\$ 2,777,362
By-law #3, Sept 1, 2019 to August 31, 2023	Board-approved EDC Expenditures Sept 1, 2019 to August 31, 2023						
		Other Eligible Costs			100%	\$ 24,716	\$ 50,612,048
	2019/20	Nora Frances Henderson Secondary (South Secondary - Upper Sherman & Rymal)	15.00	PS03	100%	\$ 424,608	\$ 51,036,656
	2020/21	Nora Frances Henderson Secondary (South Secondary - Upper Sherman & Rymal)	15.00	PS03	100%	\$ 243,303	\$ 51,279,958
	2020/21	Upper Stoney Creek (Nash Rd.)	6.00	PE08	100%	\$ 8,081,496	\$ 59,361,454
	2021/22	Nora Frances Henderson Secondary (South Secondary - Upper Sherman & Rymal)	15.00	PS03	100%	\$ 37,507	\$ 59,398,961
	2021/22	Waterdown Bay	6.00	PE01	100%	\$ 10,361,617	\$ 69,760,578
Total Expenditures June 22, 2013 to June 30, 2024						\$ 69,760,578.33	

7.7 Cash Flow Analysis and Forms H1 and H2

Table 7-5 set out a fifteen-year cash flow analysis of the proposed capital expenditure program for school sites.

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

External borrowing rates are assumed to be 6.45% including stamping fees and interest would be accrued on annual surplus account funds in the account at 5.0%. Should the HWDSB have the opportunity to accelerate the acquisition of land or an interest in land, in advance the timelines set out in the following cash flow analysis, then additional external borrowing may be required.

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

Cash Flow Assumptions:

- site acquisition costs, are assumed to escalate by 5.0% and site development costs are assumed to escalate at 2.75% per annum consistent with the background information provided in Chapter 6.
- site acquisition costs and site development costs are escalated over the full fifteen-year forecast period, in order to determine the potential funding shortfall related to the legislative rate cap, should it not be lifted during the forecast period;
- the education development charge account accrues 5.0% interest earnings per annum on positive balances.

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Explanation of the Cash Flow Analysis:

A. Revenues

- Line 1 incorporates proposed borrowing, as required
- Line 2 highlights any external funding requirements for which there is no approved funding source at this time, if applicable
- Line 3 summarizes the external funding requirements
- Line 4 determines the EDC residential collections based on the current ‘calculated’ EDC by-law rates necessary to fully recover the growth-related net education land costs
- Line 5 determines the non-residential collections based on the ‘calculated’ EDC rates.
- Line 6 subtotals the EDC residential and non-residential collections based on the ‘calculated rates’
- Line 7 states the total EDC collections plus available funds from external sources.

B. Expenditures

- Line 8 brings forward into the calculation the annual site acquisition costs. The timing of the capital expenditures determines the number of years to which the land escalation factor of 5% is applied.
- Line 9 incorporates the site preparation/development costs, and escalates these costs at 2.75% per annum over the entire 15-year forecast period.
- Line 10 incorporates projected future by-law adoption study costs based on average historical expenditures.
- Line 11 totals all projected expenditures.
- Line 12 sets out the annual principal payments against any Line of Credit borrowing.
- Line 13 incorporates annual cost of borrowing (interest payments) against the Line of Credit and ensures that the principal borrowed can be paid back at the end of the 15-year forecast period. The cash flow requires \$16.0 million in borrowing costs
- Line 14 totals the annual principal and interest payments required.
- Line 15 calculates total expenditures, including borrowing requirements by totaling Lines 11 and 14.
- Line 16 determines projected net EDC revenues less expenditures – in other words the cash balances available at any point in time to fund further growth-related expenditures.

C. Cash Flow Analysis

- Line 17 extracts the “closing balance” from the previous year and describes it as the “opening balance” in the following year. The Year 1 balance is reflective of the projected EDC account balance as of the day prior to implementation of the proposed by-law
- Line 18 pulls forward the revenues less expenditures balance
- Line 19 calculates a sub-total of Lines 17 and 18

- Line 20 indicates the level of principal payments outstanding in any given year as part of calculating the total external financial obligations of the Board
- Line 21 indicates the total financial obligations including any principal payments outstanding
- Line 22 accrues EDC account interest earnings at 5.0% on the sub-total on the annual closing balance
- Line 23 is the total financial obligations outstanding including any principal payments less any interest earned to date
- Line 24 is the annual closing balance excluding any principal owed
- Line 25 determines the cumulative revenue shortfall due to the legislative cap
- Line 26 indicates the net projected EDC funding available at the end of Year 15.

It is noted the determination of the unfunded net education land costs estimated to be more than \$140.96 million unless the legislative ‘cap’ is lifted, and based on the following calculation:

1. Determine the percentage additional growth-related share of the proposed school sites in Years 6, 11 and 15 as additional eligible acres, for both elementary and secondary sites, and apply the average appraised values per acre. Calculate the increase site acquisition and site preparation costs for each
2. Divide the total net eligible growth-related pupil places into the total net new units to derive a NGRPP per unit factor (both panels combined)
3. Multiply #2 above times the projected net new dwellings Yrs 6 to 10; Yrs 11 to 15 and average over 15 years to determine the additional NGRPP that the board would reasonably derive as additional growth-related needs within these time periods
4. Multiply the total 15-year average site acquisition costs per pupil and the average site preparation costs per pupil times #4 above and subtract the values derived in #1 above.

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 apportionment of net education capital costs to determine the residential education development charge per unit and the non-residential rate per square foot of gross floor area was based the same policy decision made in 2019. When the ‘calculated’ rate is not dissimilar to the ‘capped’ EDC rates, altering the residential/non-residential shares has the potential to reduce the EDC revenue potential over time. However, it must be noted, while the Board has the ability to choose different percentage shares as a policy decision.

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.

TABLE 7-6 HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD		% of Total
CALCULATION OF EDUCATION DEVELOPMENT CHARGES		
Total Growth-Related Net Education Land Costs (over 15-year forecast period including associated financing and study costs)	\$ 145,411,200	
Site Acquisition Costs	\$ 89,785,030	61.7%
Land Escalation Costs	\$ 41,588,637	28.6%
Site Preparation Costs	\$ 8,978,365	6.2%
Site Preparation Escalation Costs	\$ 2,027,717	1.4%
Credit Line Interest Payments	\$ 1,686,506	1.2%
Study Costs	\$ 520,000	0.4%
Financial Obligations/Surplus (projected EDC Account Balance as of June 30, 2024)	\$ 6,576,854	4.5%
Interest Earnings/(Expense)	\$ (5,707,743)	-3.9%
Closing Account Balance	\$ (44,165)	0.0%
Total Net New Units	60,588	
Total Non-Residential, Non-Exempt Board-Determined GFA	21,265,271	
Residential Education Development Charge Per Unit based on 85% of Total Growth-Related Net Education Land Costs	\$ 2,040	
Non-Residential Education Development Charge Per Sq. Ft. of GFA based on 15% of Total Growth-Related Net Education Land Costs	\$ 1.03	

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APPENDIX A - EDC SUBMISSION 2024

The following outlines the EDC Submission forwarded to the Minister of Education for review and approval.

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD Education Development Charges Submission 2024 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 2024/ 2025	Year 2 2025/ 2026	Year 3 2026/ 2027	Year 4 2027/ 2028	Year 5 2028/ 2029	Average Projected Enrolment Over Five Years	
38,248	37,879	38,326	38,683	38,865	39,178	38,586	338

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 Average Projected Enrolment less Capacity
	Year 1 2024/ 2025	Year 2 2025/ 2026	Year 3 2026/ 2027	Year 4 2027/ 2028	Year 5 2028/ 2029	Average Projected Enrolment Over Five Years	
18,099	15,365	15,566	15,743	15,961	15,988	15,725	-2,374

A.2: EDC FINANCIAL OBLIGATIONS (Estimated to April 30 2024)

Adjusted Outstanding Principal:	\$69,760,578
Less Adjusted EDC Account Balance:	\$63,183,724
Total EDC Financial Obligations/Surplus:	-\$6,576,854

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
Education Development Charges Submission 2024
Forms B/C - Dwelling Unit Summary

PROJECTION OF NET NEW DWELLING UNITS ¹

	Year 1 2024/ 2025	Year 2 2025/ 2026	Year 3 2026/ 2027	Year 4 2027/ 2028	Year 5 2028/ 2029	Year 6 2029/ 2030	Year 7 2030/ 2031	Year 8 2031/ 2032	Year 9 2032/ 2033	Year 10 2033/ 2034	Year 11 2034/ 2035	Year 12 2035/ 2036	Year 13 2036/ 2037	Year 14 2037/ 2038	Year 15 2038/ 2039	Total All Units
HWDSB Jurisdiction																
Single & Semi-detached	113	404	384	113	118	126	107	98	95	526	294	346	481	602	532	4,339
Multiples	427	1,006	1,242	601	773	493	811	597	551	693	860	854	300	20	21	9,249
Apartments	3,970	3,100	2,882	3,899	3,626	3,896	3,492	3,965	4,015	3,433	3,512	3,460	2,920	3,086	3,156	52,412
Total	4,510	4,510	4,508	4,613	4,517	4,515	4,410	4,660	4,661	4,652	4,666	4,660	3,701	3,708	3,709	66,000
PE01 - Flamborough & Waterdown																
Single & Semi-detached	-	6	-	-	23	23	24	24	-	3	2	20	8	68	73	274
Multiples	-	90	91	-	-	-	52	-	42	93	112	51	-	-	-	531
Apartments	201	202	202	385	385	354	354	376	259	259	184	184	184	184	-	3,713
Total	201	298	293	385	408	377	430	400	301	355	298	255	192	252	73	4,518
PE02 - Ancaster, Dundas & Mount Hope																
Single & Semi-detached	-	6	7	20	24	19	14	14	15	103	32	83	47	66	67	517
Multiples	34	37	37	40	48	11	147	136	4	5	-	-	-	-	-	499
Apartments	-	170	-	-	-	-	189	21	61	61	40	41	-	-	-	583
Total	34	213	44	60	72	30	350	171	80	169	72	124	47	66	67	1,599
PE03 - Glanbrook & Binbrook																
Single & Semi-detached	80	80	80	-	-	-	-	-	-	90	92	75	92	181	134	904
Multiples	177	186	207	20	-	-	-	-	-	204	253	253	94	-	-	1,394
Apartments	-	-	-	-	111	-	-	-	225	-	-	60	-	105	-	501
Total	257	266	287	20	111	-	-	-	225	294	345	388	186	286	134	2,799
PE04A - Hamilton Mountain West																
Single & Semi-detached	-	140	122	44	-	-	12	-	-	36	1	-	70	71	65	561
Multiples	12	122	122	77	78	20	38	163	20	32	162	234	52	12	12	1,156
Apartments	418	103	103	232	233	333	724	440	459	273	-	-	95	95	454	3,962
Total	430	365	347	353	311	353	774	603	479	341	163	234	217	178	531	5,679
PE04B - Hamilton Mountain Center																
Single & Semi-detached	-	13	4	-	-	-	-	-	-	12	42	31	12	21	20	155
Multiples	-	68	68	-	198	198	-	50	10	121	122	51	51	8	9	954
Apartments	261	-	-	-	-	-	206	509	641	434	329	536	694	268	268	4,146
Total	261	81	72	-	198	198	206	509	651	567	493	618	757	297	297	5,255
PE04C - Hamilton Mountain East																
Single & Semi-detached	25	40	16	16	45	28	-	4	24	18	-	-	22	21	18	277
Multiples	7	27	21	9	9	-	-	83	26	21	21	21	-	-	-	245
Apartments	-	-	124	-	-	149	149	344	439	220	97	97	-	-	-	1,619
Total	32	67	161	25	54	177	149	431	489	259	118	118	22	21	18	2,141
PE05 - Lower Hamilton Central & West																
Single & Semi-detached	-	-	-	-	-	-	-	-	-	29	-	-	5	19	15	68
Multiples	-	7	7	-	3	10	143	-	260	-	12	-	-	-	-	442
Apartments	1,939	1,025	1,027	1,377	1,349	1,686	1,292	1,500	800	751	1,367	1,129	1,132	1,859	1,337	19,570
Total	1,939	1,032	1,034	1,377	1,352	1,696	1,435	1,500	1,060	780	1,379	1,129	1,137	1,878	1,352	20,080
PE06 - Lower Hamilton East & Lower Stoney Creek																
Single & Semi-detached	-	4	4	-	-	-	-	-	-	16	28	28	35	6	6	127
Multiples	100	173	178	79	48	49	180	-	-	-	-	36	36	-	-	879
Apartments	709	1,302	1,020	1,376	1,224	1,251	271	271	674	969	848	888	401	343	1,097	12,644
Total	809	1,479	1,202	1,455	1,272	1,300	451	271	674	985	876	952	472	349	1,103	13,650
PE07 - Winona																
Single & Semi-detached	-	-	-	-	26	56	57	56	56	65	-	-	37	54	58	465
Multiples	97	147	229	148	301	135	251	165	87	8	8	8	-	-	-	1,584
Apartments	200	200	200	324	324	123	123	123	273	273	273	150	-	-	-	2,586
Total	297	347	429	472	651	314	431	344	416	346	281	158	37	54	58	4,635
PE08 - Upper Stoney Creek																
Single & Semi-detached	8	115	151	33	-	-	-	-	-	154	97	109	153	95	76	991
Multiples	-	149	282	228	88	70	-	-	102	209	170	200	67	-	-	1,565
Apartments	242	98	206	205	-	-	184	381	184	193	374	375	414	232	-	3,088
Total	250	362	639	466	88	70	184	381	286	556	641	684	634	327	76	5,644

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

Grand Total Gross New Units in By-Law Area	66,000
Less: Statutorily Exempt Units in By-Law Area	-5,412
Total Net New Units in By-Law Area	60,588

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
 Education Development Charges Submission 2024
 Form D - Non-Residential Development**

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

Total Estimated Non-Residential Board-Determined Gross Floor Area to be Constructed Over 15 Years From Date of By-Law Passage	30,728,757
Less: Board-Determined Gross Floor Area From Exempt Development	9,463,486
Net Estimated Board-Determined Gross Floor Area	21,265,271

FORM E
HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
Education Development Charges Submission 2024
Elementary Panel

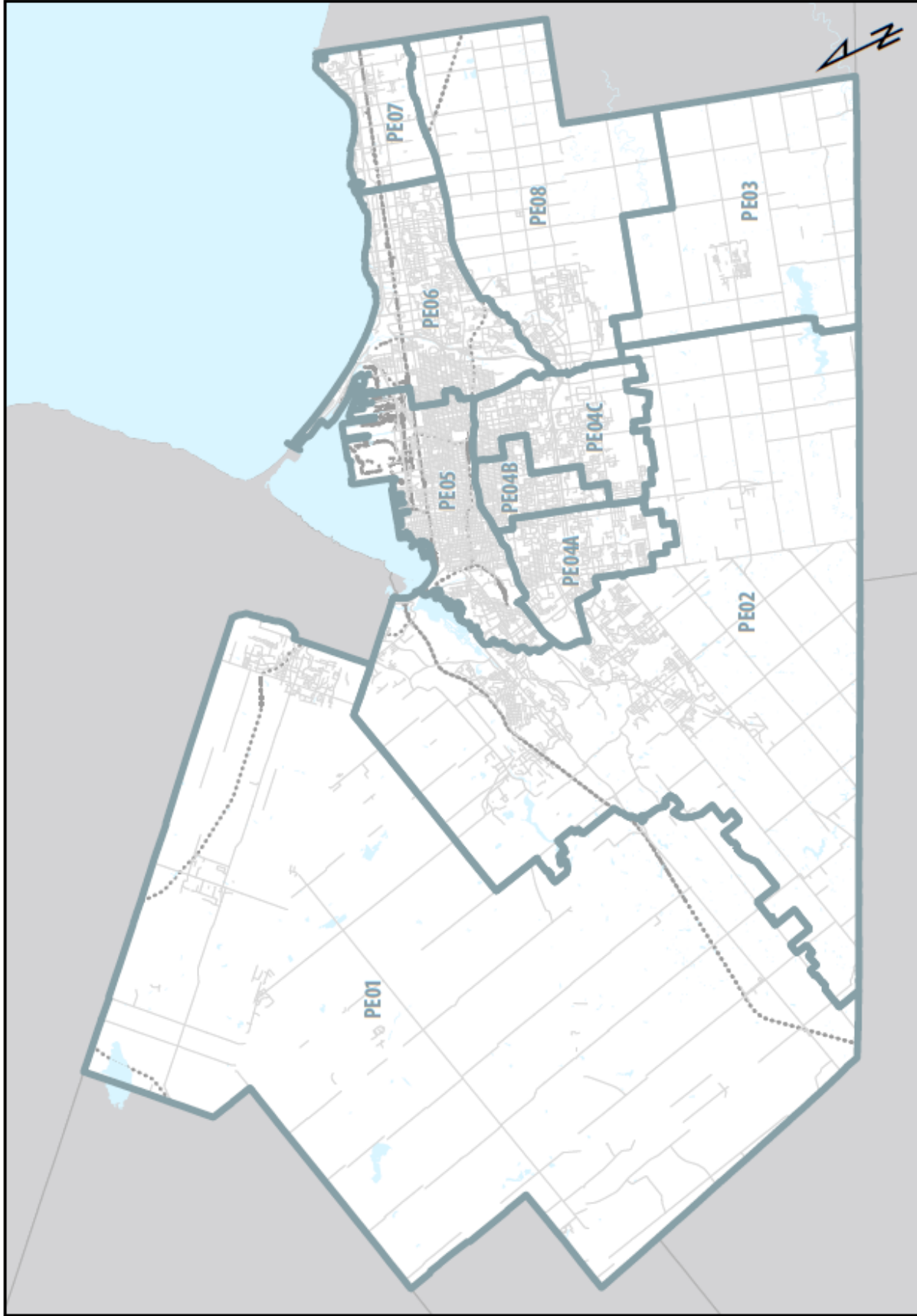
2024 Weighted Blended Pupil Yields												
Review Area	Total Cumulative 15 Year New Unit Projections (1)	% Total Forecast Municipal Residential Growth (2)	Weighted Blended EDC Pupil Yield (3)	2024/2025-2038/2039 Pupil Requirements of New Development (4)=(3) x (1)	2023/2024 OTG Capacity (5)	2038/2039 ADE Existing Community Projections (6)	Net Growth Related Pupil Place Requirements (7)	SINGLE and SEMI-DETACHED	MEDIUM DENSITY	APARTMENTS (includes purpose-built seniors housing and student housing)	STACKED TOWNHOUSES	TOTAL UNITS
PE01 - Hamborough & Waterdown	4,518	7%	0.0520	235	2,894	3,336	646	0.3001	0.2110	0.0110	0.0000	0.0520
PE02 - Ancaster, Dundas & Mount Hope	1,599	2%	0.1884	301	5,184	5,189	579	0.3259	0.2533	0.0110	0.0000	0.1884
PE03 - Glanbrook & Binbrook	2,799	4%	0.2640	739	905	1,413	1,234	0.3703	0.2860	0.0110	0.0000	0.2640
PE04A - Hamilton Mountain West	5,679	9%	0.0810	460	3,500	3,241	-	0.2350	0.2460	0.0110	0.0000	0.0810
PE04B - Hamilton Mountain Center	5,255	8%	0.0625	328	2,667	2,870	-	0.3100	0.2460	0.0110	0.0000	0.0625
PE04C - Hamilton Mountain East	2,141	3%	0.0851	182	4,452	4,468	-	0.3760	0.2460	0.0110	0.0000	0.0851
PE05 - Lower Hamilton Central & West	20,080	30%	0.0166	333	9,084	7,701	-	0.2834	0.2220	0.0110	0.0000	0.0166
PE06 - Lower Hamilton East & Lower Stoney Creek	13,650	21%	0.0269	367	6,029	6,671	-	0.2600	0.2220	0.0110	0.0000	0.0269
PE07 - Winona	4,635	7%	0.1394	646	761	874	760	0.2020	0.3130	0.0110	0.0000	0.1394
PE08 - Upper Stoney Creek	5,644	9%	0.1477	834	2,772	3,180	734	0.3274	0.3036	0.0110	0.0000	0.1477
TOTAL	66,000	100%	0.0671	4,425	38,248	38,944	3,952	0.3153	0.2682	0.0110	0.0000	0.0671

Secondary Panel

2024 Weighted Blended Pupil Yields												
Review Area	Total Cumulative 15 Year New Unit Projections (1)	% Total Forecast Municipal Residential Growth (2)	Weighted Blended EDC Pupil Yield (3)	2024/2025-2038/2039 Pupil Requirements of New Development (4)=(3) x (1)	2023/2024 OTG Capacity (5)	2038/2039 ADE Existing Community Projections (6)	Net Growth Related Pupil Place Requirements (7)	SINGLE and SEMI-DETACHED	MEDIUM DENSITY	APARTMENTS (includes purpose-built seniors housing and student housing)	STACKED TOWNHOUSES	TOTAL UNITS
PS01 - Ancaster, Hamborough, Dundas & Hamilton Mountain West	12,887	19.5%	0.0252	325	7,134	5,217	-	0.1018	0.0618	0.0056	0.0000	0.0252
PS02 - Lower Hamilton Central & West	20,075	30.4%	0.0069	139	2,937	2,654	-	0.0986	0.0520	0.0056	0.0000	0.0069
PS03 - Glanbrook, Upper Stoney Creek, East Mountain, Lower Hamilton East, Lower Stoney Creek & Winona	33,038	50.1%	0.0279	923	8,028	7,181	592	0.1064	0.0726	0.0056	0.0000	0.0279
Alternative Ed Centre						232						
TOTAL	66,000	100.0%	0.0210	1,387	18,099	15,284	592	0.1048	0.0691	0.0056	0.0000	0.0210

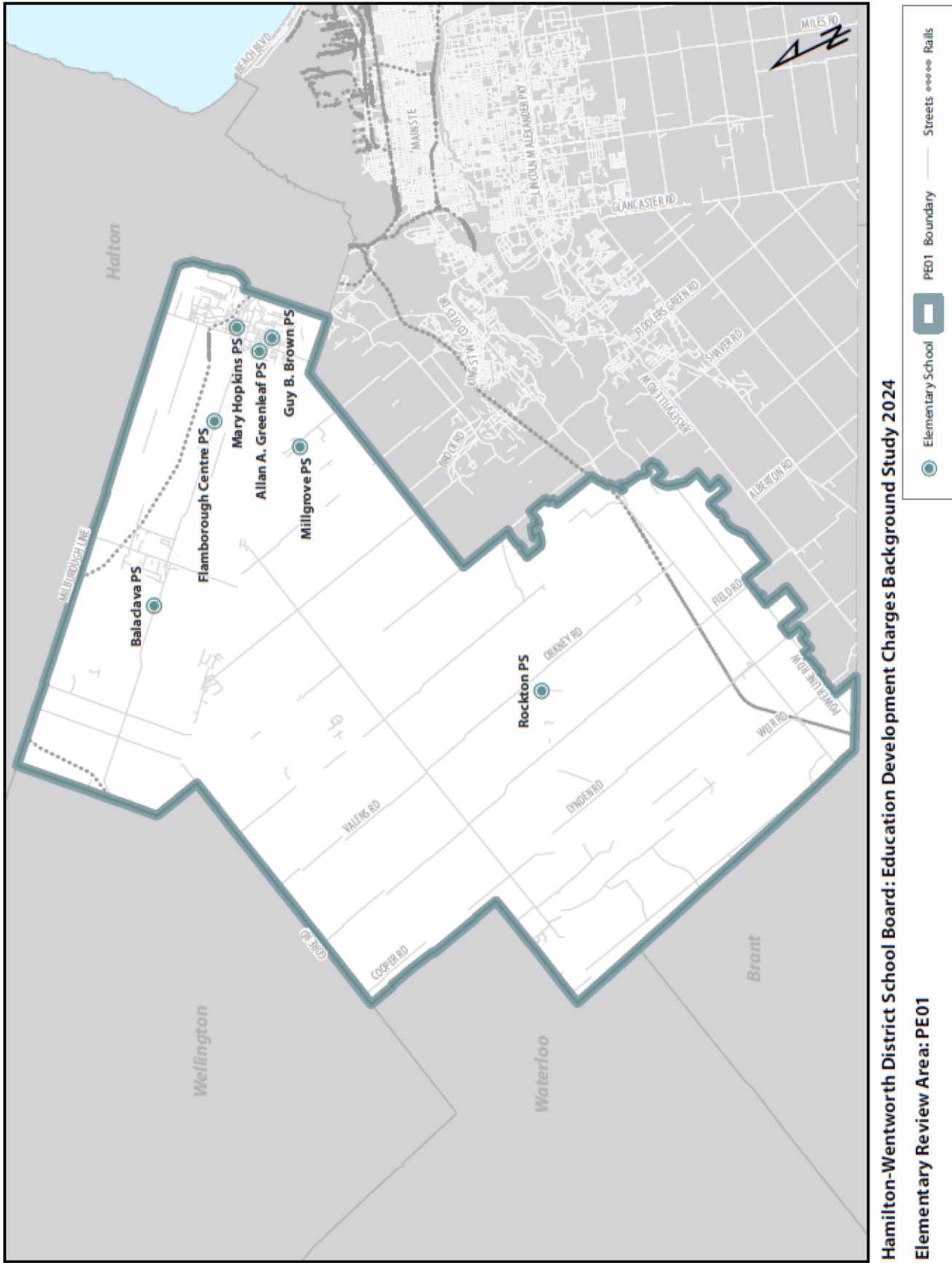
TOTAL BOTH PANELS				5,813	56,347	54,228	4,544					
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ELEMENTARY REVIEW AREAS



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024
Elementary Review Area: Overview

Review Area Map PE01



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Elementary Review Area: PE01



**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

Elementary Site	Projected Housing Growth															Weighted/Blended Elementary Yield	Total Net New Units 2038/39	Total Yr. 15 Growth-related Pupils				
	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39							
1. Elementary site Mountain View Heights site (Skinner Rd. Great Falls Blvd)																						
Total	201	298	293	385	408	377	430	400	301	355	298	255	192	252	73							

Review Area: PED1 - Flamborough & Watford

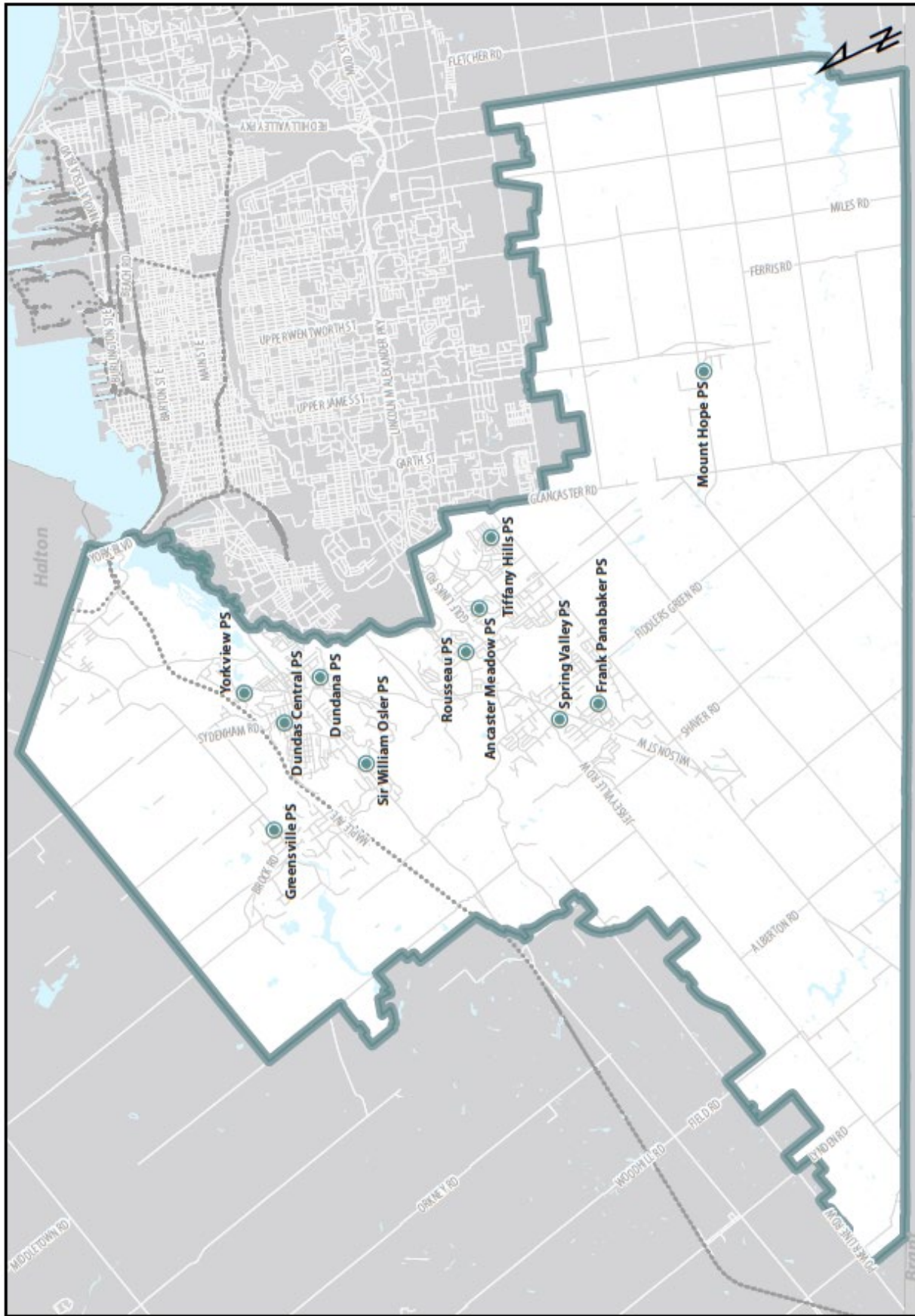
Review Area Schools	OTG Capacity 2023/24	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Total Surplus Pupil Spaces	
																		Year 16 2039/40	Year 17 2040/41
B1 Belselva PS (JK-8)	381	321	320	318	314	315	316	305	312	309	318	326	327	328	330	332	334		
B2 Millgrove PS (JK-5)	236	173	180	183	184	186	190	189	196	197	198	199	200	200	201	202	203		
B3 Rockton PS (JK-8)	453	500	511	504	510	528	540	540	537	541	547	543	546	550	553	555	558		
B4																			
B5																			
B6																			
B7																			
B8																			
B9																			
B10																			
Totals	1,070	994	1,000	1,004	1,008	1,029	1,046	1,084	1,045	1,047	1,063	1,068	1,073	1,077	1,084	1,089	1,096	6	0
Total ROND																			
Total Surplus Pupil Spaces																			

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity 2023/24	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Total Surplus Pupil Spaces	
																		Year 16 2039/40	Year 17 2040/41
C1 Allan A. Greenleaf School (JK-8) (shared site)	548	600	591	583	569	565	544	538	537	534	541	543	547	552	557	562	567		
C2 Flamborough Centre Senior PS (Gr 6-8)	243	343	405	407	409	427	438	421	397	372	377	368	370	372	375	377	379		
C3 Glen Brown (JK-8, F1-9)	632	643	646	644	658	650	650	653	662	663	679	684	686	687	690	692	694		
C4 Mary Hopkins PS (JK-4 FI)	401	673	653	642	628	596	576	581	573	576	580	583	586	588	588	596	601		
C5																			
C6																			
C7																			
C8																			
Totals	1,884	2,239	2,238	2,200	2,130	2,289	2,270	2,266	2,284	2,251	2,294	2,319	2,356	2,381	2,398	2,484	2,470	15	25.12
Total Pupil Spaces Available to Accommodate Growth																			

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PE02



**Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024
Elementary Review Area: PE02**

- Elementary School
- PE02 Boundary
- Streets
- Rails

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024

Table with columns: Total HGRPP, Weighted/Blended Elementary Yield, Total Net New Units 2038/39, Total Yr. 15 Growth-related Pupils. Rows include Low Density, Medium Density, High Density-Apartments, Total Net Dwelling Units.

Table with columns: Year 1-6, Year 7-9, Year 10-12, Year 13-15, Year 14-15. Rows include Projected Housing Growth, Low Density, Medium Density, High Density-Apartments, Total Net Dwelling Units.

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

Table for Review Area Schools (B1-B7) showing OTG Capacity, Current Capacity, and projected growth from Year 1 to Year 15 across various categories.

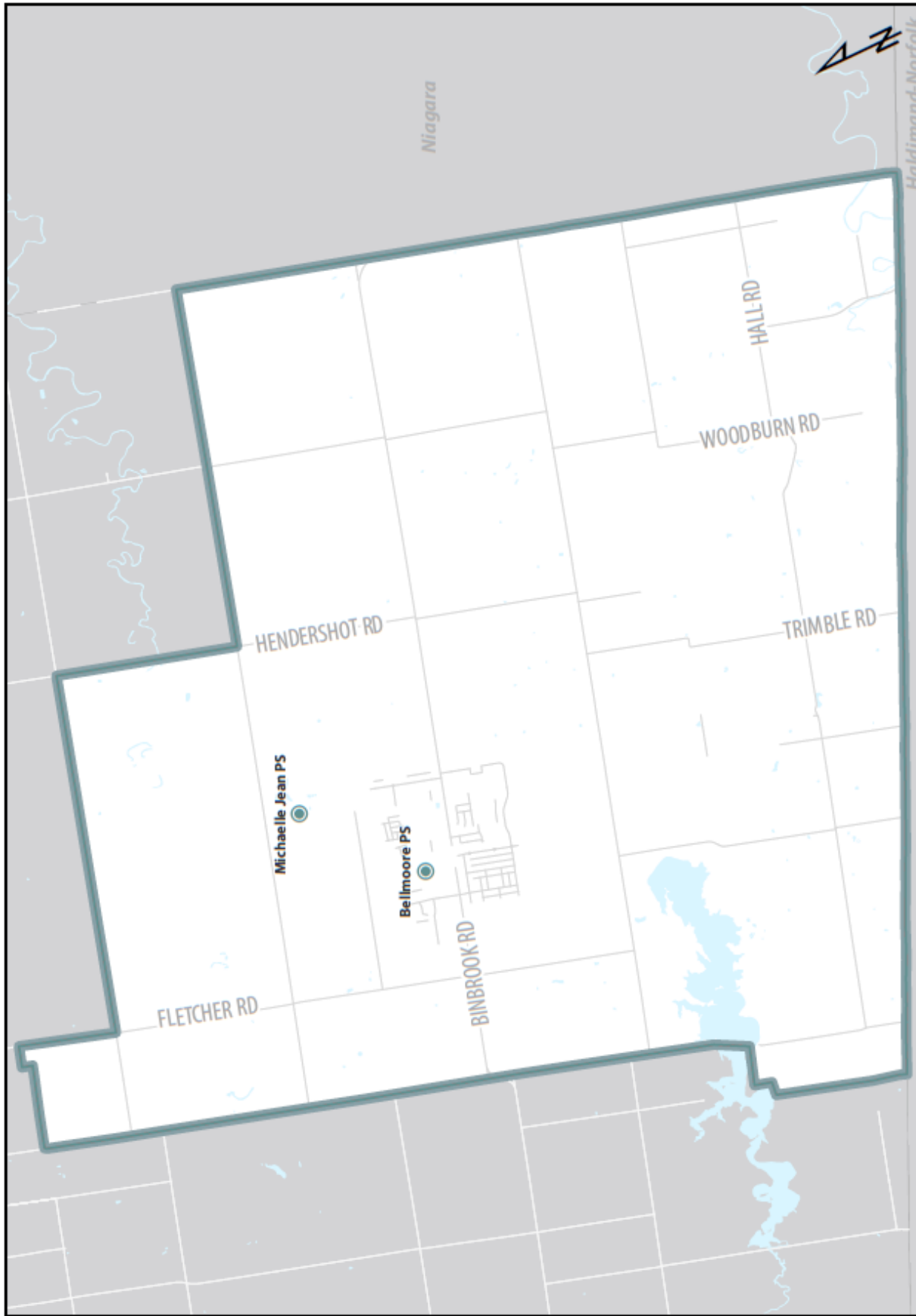
Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Table for Review Area Schools (C1-C7) showing OTG Capacity, Current Capacity, and projected growth from Year 1 to Year 15, including pupil spaces.

Summary table for Review Area Schools (D) showing OTG Capacity, Current Capacity, and projected growth from Year 1 to Year 15.

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PE03



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Elementary Review Area: PE03



**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

Total Net New Units 2038/39	Weighted/ Blended Elementary Yield	Projected Housing Growth						Total Net New Units 2038/39	Total Yr. 15 Growth-related Pupils
		Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30		
904	0.3703	80	80	80	80	80	904	335	
1,394	0.2860	177	386	207	20	-	1,394	399	
501	0.0110	257	266	287	20	111	501	6	
2,799	0.2660	514	732	574	40	222	2,799	739	

Total Net Dwelling Units	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39
286	225	254	345	388	386	279	278

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Existing Site Size		
																			# of Portables	
B1. Ecole Elementaire Michaele Jean (1-8 H)	265	303	295	280	281	267	268	263	269	271	271	274	275	276	278	279	278	0	7.37	
B2.																				
B3.																				
B4.																				
B5.																				
B6.																				
B7.																				
B8.																				
B9.																				
B10	265	303	295	280	281	267	268	263	269	271	271	274	275	276	278	279	278	0	7.37	
Totals	265	303	295	280	281	267	268	263	269	271	271	274	275	276	278	279	278	0	7.37	
Total ROND																				
Total Surplus Pupil Spaces																				

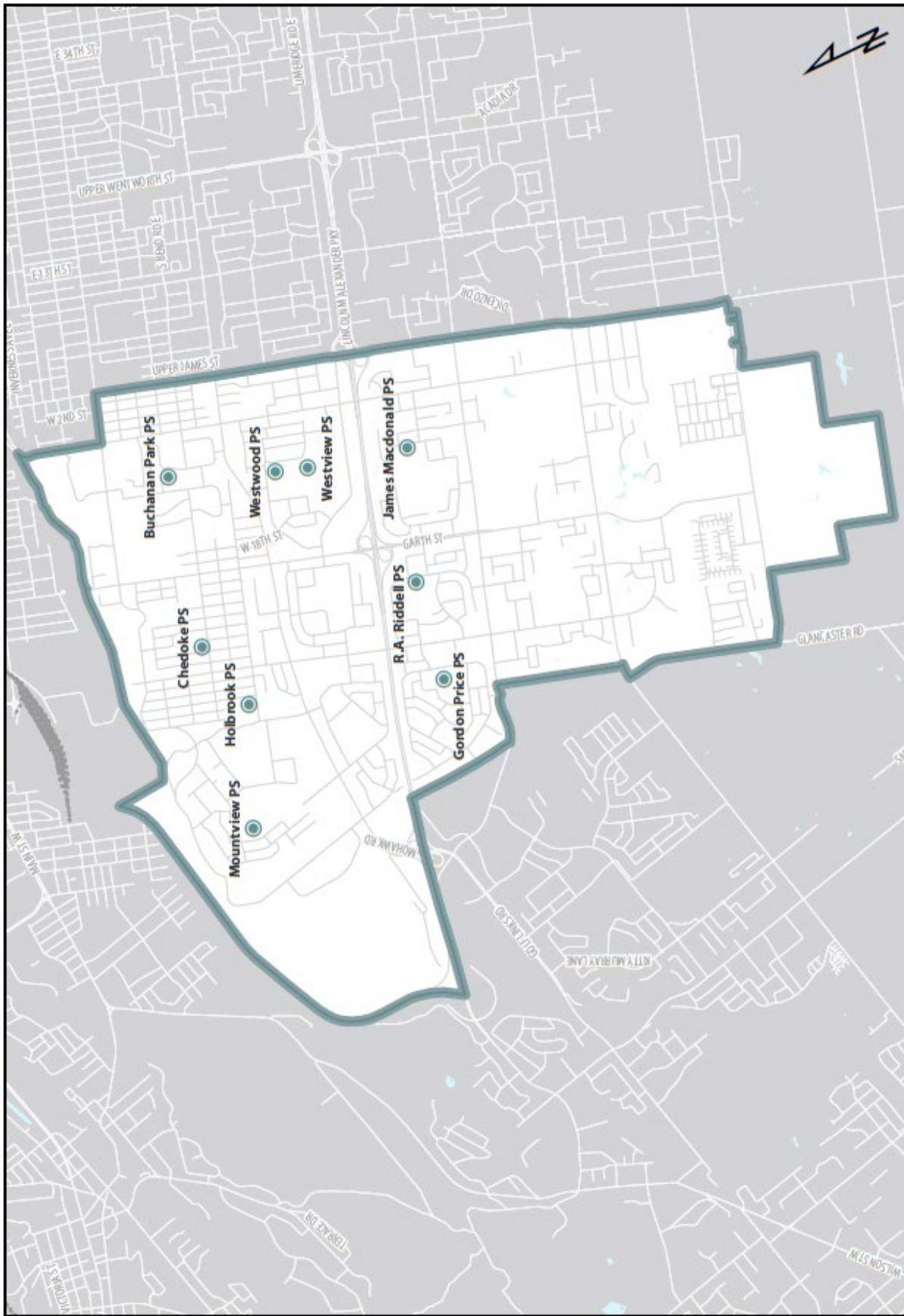
Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Existing Site Size		
																			# of Portables	
C1. Bellmore (K-8, Spect Ed)	640	998	699	701	678	675	667	668	667	663	669	679	684	691	698	706	713	80	8.01	
C2. Binbrook II			479	470	455	436	422	419	410	409	407	421	421	421	421	421	421		0	0.00
C3.			79	160	247	252	254	264	274	285	287	359	433	506	599	602	659		659	
C4.																				
C5.																				
C6.																				
C7.																				
C8.																				
Totals	640	998	1,256	1,330	1,379	1,363	1,351	1,351	1,351	1,357	1,364	1,477	1,579	1,677	1,736	1,808	1,874	739	4	8.01
Total Pupil Spaces Available to Accommodate Growth																				

Requirements of New Development for Growth Areas (Cumulative)	160	247	252	254	264	274	285	287	377	474	565	616	681	739
D														1,234

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital/priority needs due to distance.

Review Area Map PE04A



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Elementary Review Area: PE04A

Legend:

- Elementary School (Blue circle icon)
- PE04A Boundary (Thick dark green line)
- Streets (Thin grey line)
- Rails (Dashed grey line)

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024

Total No. growth-related site needs	Projected Housing Growth										Weighted/Blended Elementary Yield	Total Net New Units 2038/39	Total Yr. 15 Growth-related Pupils		
	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34				Year 11 2034/35	Year 12 2035/36
1.	-	140	122	44	-	-	12	-	-	36	1	-	70	71	65
2.	12	122	122	77	78	20	38	163	20	32	32	162	234	52	12
3.	418	103	103	232	233	333	724	440	459	273	-	-	95	95	454
A. Total Net Dwelling Units	430	365	367	353	311	353	774	603	679	344	163	234	217	178	531
Total Net Dwelling Units															
Low Density															
Medium Density															
High Density - Apartments															
Total Net Dwelling Units															

Review Area: PE04A - Hamilton Mountain West

OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39
B1 Buchanan Park (JK-6)	245	180	181	182	181	189	193	189	198	199	200	201	202	203	204	205
B2 Chedoke (JK-8, Spec Ed)	510	441	457	477	494	489	486	485	484	478	482	484	486	489	492	495
B3 Gordon Price (JK-8)	442	402	395	396	386	379	368	370	377	379	377	378	379	381	383	386
B4 Holbrook (JK-6)	326	219	207	204	188	169	168	168	168	169	170	171	172	172	172	173
B5 James Macdonald (JK-6)	354	315	298	281	274	271	270	268	269	270	271	272	274	276	277	278
B6 Mountview (JK-6)	291	268	267	271	261	266	270	262	269	270	271	272	273	274	276	277
B7 R.A. Riddell (JK-8, Prog of Choice 6-8)	594	767	753	758	761	766	779	795	795	800	796	798	802	808	812	816
B8 Westview (Gr 6-8, Spec Ed) (shared site)	343	252	271	290	298	297	276	268	259	264	265	266	267	269	272	274
B9 Westwood (JK-5, Spec Ed) (shared site)	395	342	344	342	334	317	330	325	327	329	331	332	334	336	337	338
Totals	3,500	3,186	3,172	3,201	3,176	3,142	3,140	3,130	3,146	3,159	3,162	3,174	3,188	3,207	3,224	3,241
Total ROND	8	72	131	163	185	185	194	214	259	269	288	328	366	416	437	460
B Total Surplus Pupil Spaces	314	320	328	393	373	317	367	356	395	373	350	-	-	-	-	-

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

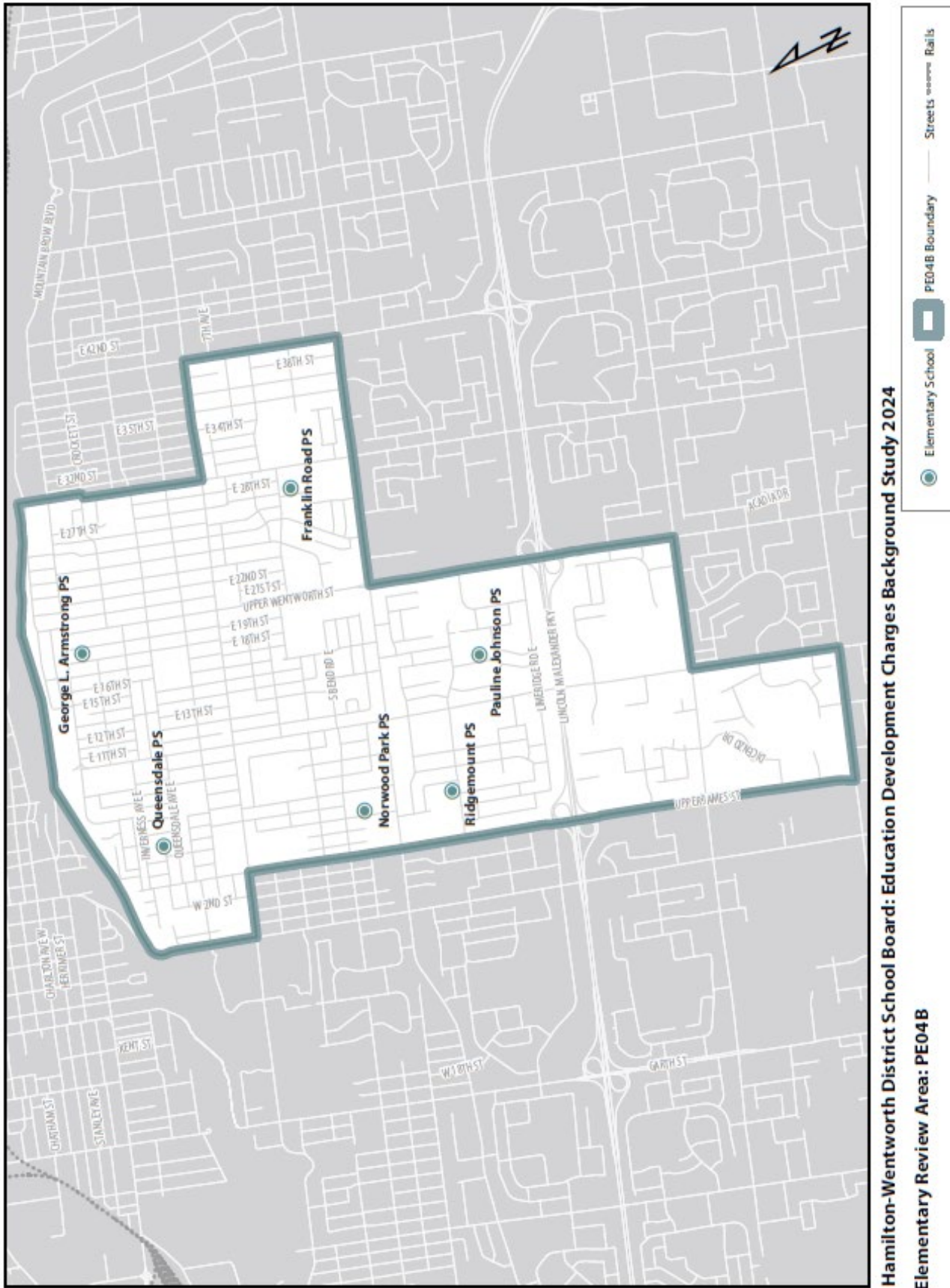
OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39
B10																
C1																
C2																
C3																
C4																
C5																
C6																
C7																
C8																
Totals	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
C Total Pupil Spaces Available to Accommodate Growth																

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39
ROND																
ROND																
ROND																
ROND																
ROND																
ROND																
ROND																
ROND																
Totals	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
D Requirements of New Development for Growth Areas (Cumulative)																

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PE04B



**Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024
Elementary Review Area: PE04B**

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

1. No growth-related site needs	Projected Housing Growth													Total Yr. 15 Growth-related Pupils
	Total NGPPP	Weighted/Blended Elementary Yield												
	0	0.3100												155
2.		0.2460												954
		0.0110												4,146
3.		0.0625												5,255
		0.0110												4,146
		0.0625												5,255

Review Area: PB04B - Hamilton Mountain Center

Projected Housing Growth	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39
Low Density	13	68	88	4	198	198	50	50	30	121	12	42	31	12	21
Medium Density	68	68	68	68	206	206	206	509	641	434	329	556	694	564	268
High Density - Apartments	261	261	261	261	198	198	206	559	651	567	493	618	757	297	297
Total Net Dwelling Units	261	81	72	-	198	198	206	559	651	567	493	618	757	297	297

Review Area Schools not impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39
B1 Franklin Road (JK-8)	495	559	555	583	565	572	564	551	549	547	550	544	546	549	552	555	558
B2 George L. Armstrong (JK-8)	541	422	429	438	441	442	447	455	466	467	465	472	475	478	480	482	485
B3 Norwood Park (F1-8)	464	499	500	476	454	451	447	438	449	451	452	455	457	460	462	464	466
B4 Pauline Johnson (JK-8)	426	489	487	490	488	488	485	479	473	476	476	481	483	485	488	490	493
B5 Queensdale (JK-8)	317	365	382	391	385	392	397	403	415	419	420	422	424	426	428	430	432
B6 Ridgemoor (JK-8)	424	436	426	426	421	417	426	427	423	414	421	426	428	430	432	435	436
B7																	
B8																	
B9																	
B10																	
Totals	2,667	2,770	2,789	2,783	2,754	2,762	2,765	2,753	2,774	2,774	2,785	2,799	2,813	2,827	2,842	2,856	2,870
Total ROND			3	24	42	42	90	139	141	159	169	207	254	282	306	317	328
Total Surplus Pupil Spaces																	

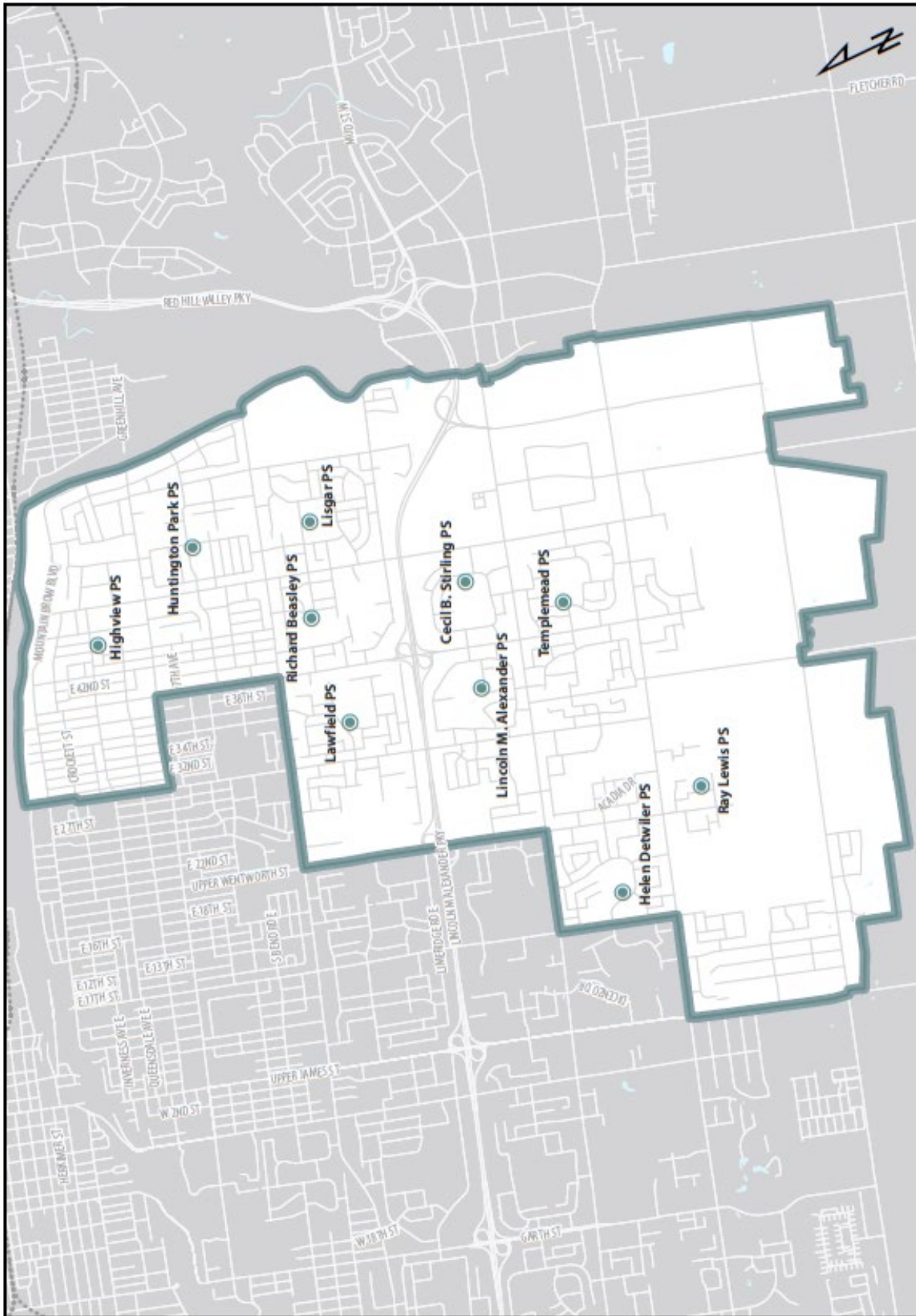
Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39
C1																	
C2																	
C3																	
C4																	
C5																	
C6																	
C7																	
C8																	
Totals																	
Total Pupil Spaces Available to Accommodate Growth																	

D Requirements of New Development for Growth Areas (Cumulative)

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PE04C



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Elementary Review Area: PE04C

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

1. No growth-related site needs	Projected Housing Growth												Weighted/ Blended Elementary Yield	Total Net New Units 2038/39	Total Yr. 15 Growth- related Pupils										
	Total NGRPP	Year 9 2032/33	Year 8 2031/32	Year 7 2030/31	Year 6 2029/30	Year 5 2028/29	Year 4 2027/28	Year 3 2026/27	Year 2 2025/26	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27				Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37
Low Density																			24	18	-	-	22	21	18
Medium Density	0																		83	76	21	21	-	-	-
High Density - Apartments																			459	220	97	97	-	-	-
Total Net Dwelling Units																			488	259	118	118	22	21	18

Review Area: PE04c - Hamilton Mountain East

Review Area Schools	OTG Capacity	Current 2023/24	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	Existing Site Size
			2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	
B1 Cecil B. Stirling (JK-8)	326	309	316	321	330	345	348	367	381	376	371	375	376	377	378	379	382	0
B2 Helen Dewinter (JK-8)	444	461	447	466	494	417	419	419	417	410	408	422	423	425	429	431	433	19
B3 Highview (JK-8)	511	554	566	574	569	575	587	587	598	594	610	595	599	602	605	608	612	25
B4 Huntington Park (JK-8, Spec Ed)	453	477	483	482	496	490	501	500	504	516	522	518	520	523	526	528	530	0
B5 Lawfield ES (JK-8, FI 1-8)	602	714	711	703	689	693	692	689	694	699	703	707	710	713	718	722	724	3
B6 Lincoln M. Alexander (JK-6, Spec Ed)	326	232	234	237	241	245	242	241	234	245	246	247	248	249	250	252	253	0
B7 Lisgar (JK-8)	369	315	310	300	290	277	272	268	262	258	263	263	264	265	267	268	269	0
B8 Ray Lewis P.S. (JK-8)	628	541	519	512	505	513	513	522	522	516	507	515	517	519	521	524	528	110
B9 Richard Beasley (JK-5)	280	151	143	145	149	146	148	153	153	154	155	156	156	157	157	157	158	0
B10 Templemead (JK-8, Spec Ed)	513	596	588	585	579	580	582	588	556	566	562	564	567	571	574	577	580	0
Totals	4,452	4,350	4,314	4,305	4,280	4,281	4,285	4,312	4,322	4,324	4,324	4,362	4,401	4,401	4,425	4,446	4,468	182
Total ROND		11	33	45	54	54	73	85	87	112	133	147	153	159	168	176	182	0
Total Surplus Pupil Spaces		102	127	114	127	118	94	55	43	16	-	-	-	-	-	-	-	8

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

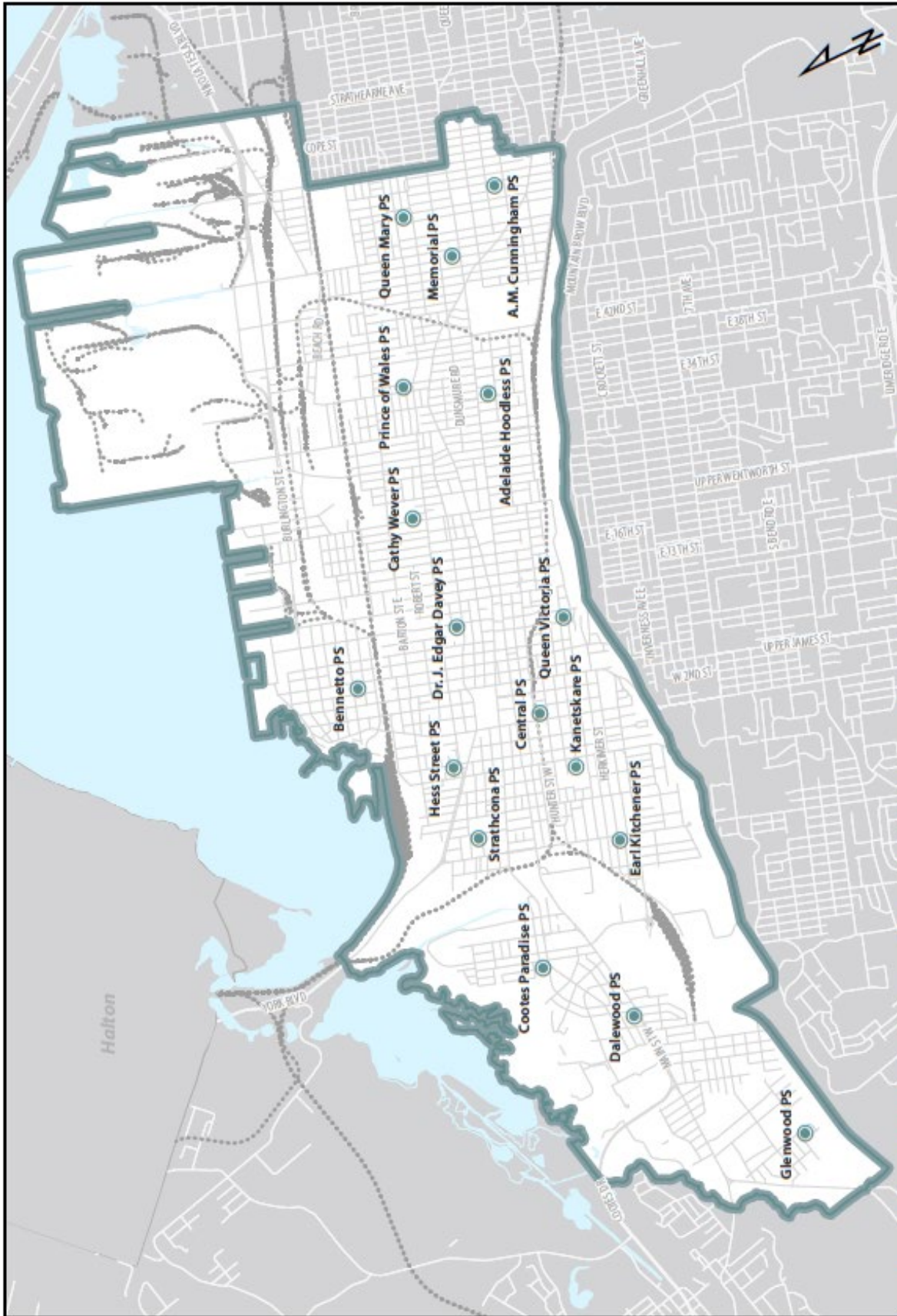
C1	OTG Capacity	Current 2023/24	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	Existing Site Size
			2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	
C1 ROND																		
C2 ROND																		
C3 ROND																		
C4 ROND																		
C5 ROND																		
C6 ROND																		
C7 ROND																		
C8 ROND																		
C9 ROND																		
C10 ROND																		
Totals																		0
Total Pupil Spaces Available to Accommodate Growth																		0

D. Requirements of New Development for Growth Areas (cumulative)

D	OTG Capacity	Current 2023/24	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	Existing Site Size
			2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	
D																		

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PE05



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Elementary Review Area: PE05

Elementary School PE05 Boundary Streets Rails

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

		Projected Housing Growth										Weighted/ Blended Elementary Yield		Total Net New Units 2038/39	Total Yr.15 Growth- related Pupils					
		Low Density										Medium Density		High Density - Apartments		Total Net Dwelling Units				
Total NEPPP	0	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39				
1. No growth-related site needs	0	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
2. Low Density	3	472	481	485	483	487	484	488	489	482	495	498	498	501	502	505	507	4	4.52	
3. Medium Density	3	576	610	638	657	673	683	689	673	681	694	687	690	693	693	697	701	3	2.14	
4. High Density - Apartments	3	1,939	1,025	1,027	1,377	1,349	1,686	1,292	1,900	800	527	529	531	534	534	537	539	50	0	5.52
A. Total Net Dwelling Units	3	1,939	1,032	1,034	1,377	1,352	1,696	1,435	1,500	1,060	780	1,370	1,129	1,137	1,137	1,129	1,137	10	0	6.51

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

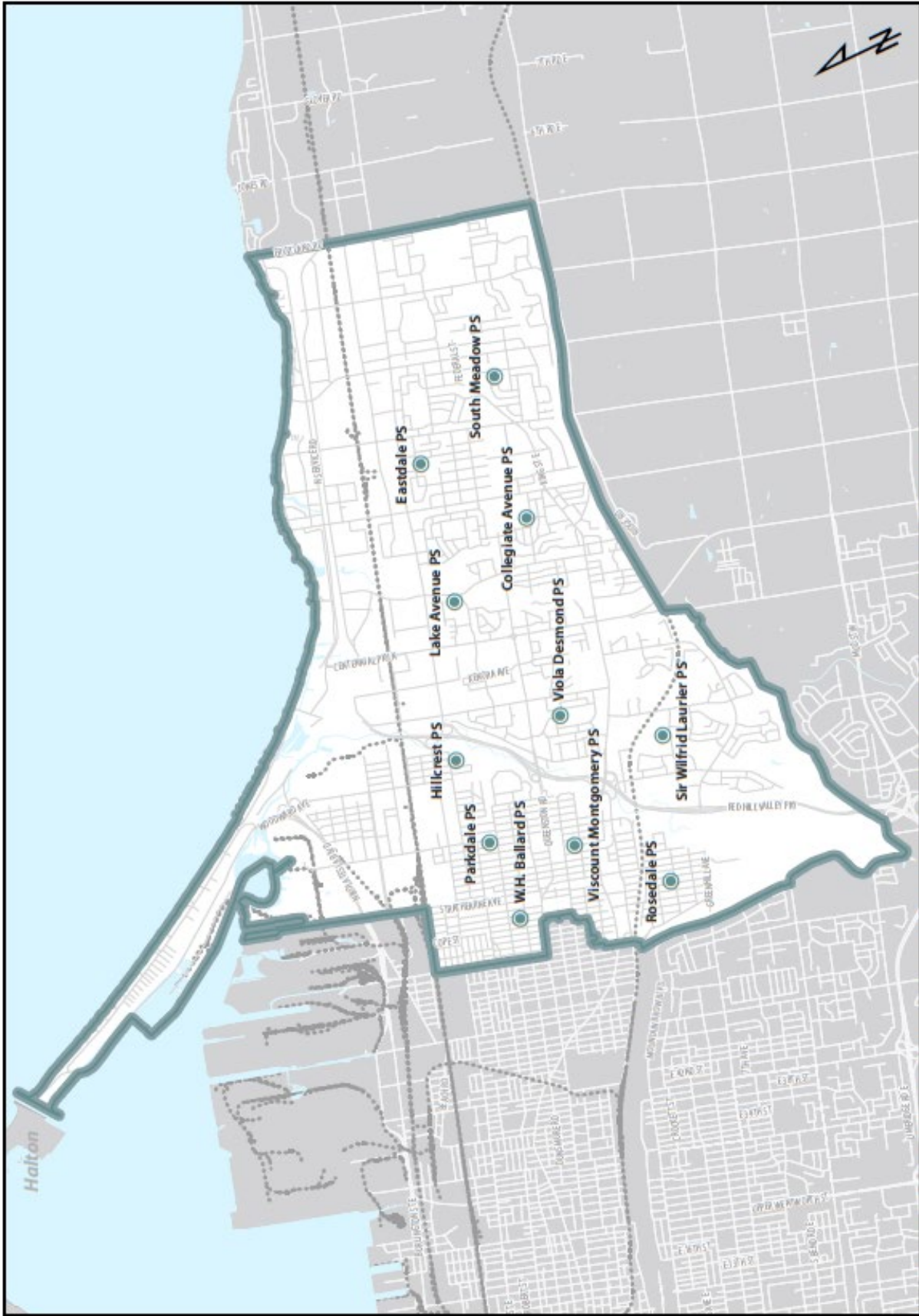
Review Area Schools	OTG Capacity 2023/24	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	# of Portables	Existing Site Size	
B1 A. M. Cunningham (JK-5, FI)	389	460	472	481	485	483	487	484	488	489	482	495	498	498	501	502	505	47	4	4.52
B2 Adalade Hoodless (JK-8)	574	555	576	610	638	657	673	683	689	673	681	694	687	690	693	697	701	3	0	2.14
B3 Benvenuto (JK-8, FI, Spec Ed)	721	550	541	544	550	559	574	572	568	573	576	579	581	584	587	590	592	50	0	5.52
B4 Cathy Weaver Elementary School (portion of site leased to City) (JK-8)	786	555	537	527	510	513	510	516	515	522	521	527	529	531	534	537	539	10	0	6.51
B5 Central (JK-5)	283	322	322	320	325	320	321	320	322	324	326	326	328	329	331	332	334	18	4	2.76
B6 Coates Paradise (JK-5, FI)	666	565	556	552	551	543	550	552	554	556	558	560	563	566	568	570	573	13	0	4.00
B7 Dalewood (Gr 6-8, FI)	370	271	265	264	232	231	219	216	209	216	217	217	217	217	218	220	221	6	0	4.99
B8 Dr. J Edgar Davey (JK-8)	726	559	567	556	556	551	557	571	572	576	579	579	582	584	587	590	593	70	0	2.02
B9 Earl Kitchener (JK-5, FI)	548	538	531	531	497	510	507	497	502	504	507	509	509	509	509	509	511	5	0	1.85
B10 Glenwood (Alt Ed Program)	99	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	0	0	2.39
B11 Hays Street (JK-8, Spec Ed)	450	322	326	337	347	351	363	377	381	379	378	382	383	384	386	388	391	33	0	1.80
B12 Kenneth Kane (6 & 8 FI, Prog Choice 6-8)	343	390	386	426	438	417	400	398	412	407	399	399	400	401	403	406	407	14	1	2.15
B13 Memorial PS (Hamilton) (JK-8, Spec Ed)	668	356	358	356	368	379	378	389	387	395	386	394	396	397	399	401	403	23	0	5.33
B14 Prince of Wales (JK-8)	772	544	522	502	479	460	451	464	455	454	448	456	458	459	462	465	466	0	0	1.94
B15 Queen Mary (JK-8, Spec Ed)	666	531	526	524	518	516	500	510	498	498	502	505	508	511	513	516	519	1	0	3.18
B16 Queen Victoria (JK-8, Spec Ed)	778	606	609	619	622	642	653	665	666	668	670	670	673	676	680	684	688	30	0	1.72
B17 Stratcona (JK-5, Prog of Choice)	245	217	223	220	215	224	220	223	222	224	225	226	227	229	231	232	232	11	0	1.13
Totals	9,084	7,464	7,837	7,374	7,353	7,374	7,388	7,455	7,483	7,479	7,466	7,530	7,561	7,592	7,627	7,665	7,701	333	9	53.97
B Total Surplus Pupil Spaces	1,790	1,725	1,676	1,684	1,688	1,679	1,631	1,444	1,477	1,461	1,361	1,311	1,262	1,219	1,169	1,106	1,050	0	0	0.00

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity 2023/24	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	# of Portables	Existing Site Size	
C1																				
C2																				
C3																				
C4																				
C5																				
C6																				
C7																				
C8																				
C Total Pupil Spaces Available to Accommodate Growth																		0	0	0.00
D Requirements of New Development for Growth Areas (Cumulative)																				

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that does not meet longer term capital priority needs due to distance.

Review Area Map PE06



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Elementary Review Area: PE06

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024

	Projected Housing Growth											Weighted/Blended Elementary Yield	Total Net New Units 2038/39	Total Yr. 15 Growth-related Pupils	
	Total Newpp	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Year 16 2039/40	Year 17 2040/41	Year 18 2041/42	Year 19 2042/43				
1. No growth-related site needs	0												0.2600	127	33
2.													0.2220	879	195
3.													0.0110	12,644	139
													0.0269	13,650	367

Review Area: PE06 - Lower Hamilton East & Lower Stoney Creek															
Projected Housing Growth															
	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39
Low Density	100	173	178	79	48	49	180	-	-	16	28	28	35	6	6
Medium Density	709	1,302	1,020	1,376	1,224	1,251	271	271	674	969	848	888	401	343	1,097
High Density - Apartments	809	1,479	1,202	1,455	1,272	1,300	451	271	674	969	876	952	472	349	1,103
Total Net Dwelling Units															

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

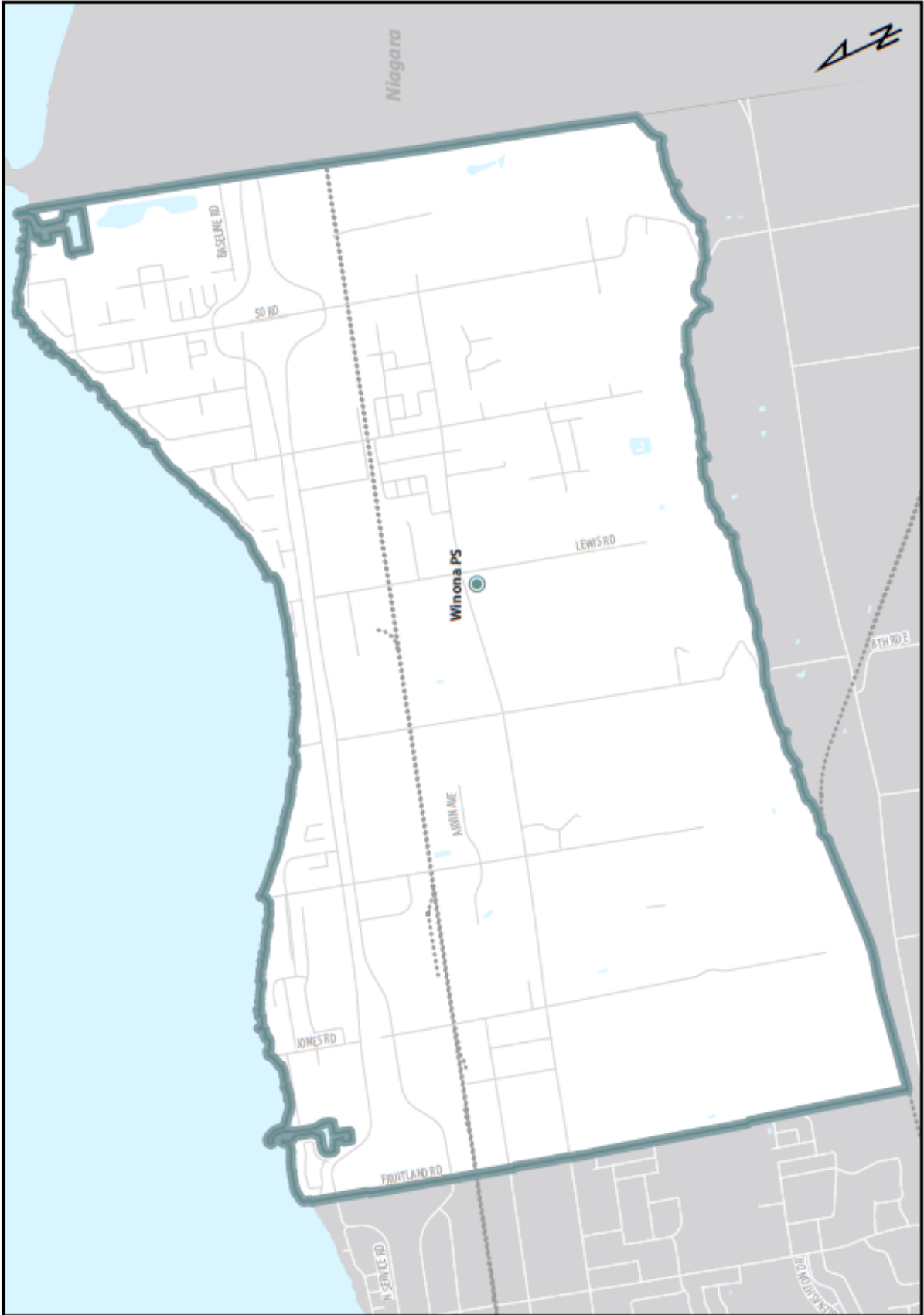
Review Area Schools	OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Existing Site Size	# of Portables		
																				ROND	# of Portables
B1 Collegiate Avenue PS (JK-8)	495	448	459	466	480	495	509	527	529	589	541	542	544	546	549	553	555	571	0	5.71	
B2 Exdale (JK-8, FI)	555	858	885	923	915	916	942	964	970	987	989	989	993	995	991	987	987	983	28	12	4.28
B3 Hillcrest (JK-8, Spec Ed)	764	485	488	489	482	484	484	480	473	486	484	491	493	495	497	499	499	501	0	0	5.71
B4 Lake Avenue (JK-8)	516	659	669	664	676	667	673	674	666	673	670	674	677	680	684	688	688	691	15	8	9.08
B5 Parkdale (JK-5, FI)	291	285	291	272	274	274	268	271	272	272	273	275	276	278	280	281	282	282	2	2	3.66
B6 Rosedale (JK-5)	211	294	308	313	308	317	320	317	322	323	325	327	329	332	333	335	337	337	13	4	2.78
B7 Sir Wilfrid Laurier (JK-8, Spec Ed)	758	790	757	745	742	734	725	714	695	700	698	689	692	695	698	702	705	705	29	2	10.00
B8 South Meadow Elementary School (JK-8)	495	599	599	602	600	588	579	581	575	575	580	576	579	582	586	589	592	592	0	3	6.34
B9 Villa Desmond (JK-8) (shared site)	680	802	804	814	807	799	807	817	817	806	777	783	787	792	796	800	802	802	131	7	0.00
B10 Wisconsin Montgomery (JK-8, Spec Ed)	444	446	435	443	474	480	483	479	496	504	501	503	505	507	510	512	515	515	115	2	6.60
B11 W. H. Ballard (JK-8, Gr 6-8 FI)	510	651	647	663	675	675	680	676	694	698	680	690	692	694	698	702	706	706	3	0	2.69
Totals	6,029	6,317	6,342	6,406	6,419	6,424	6,476	6,495	6,508	6,561	6,519	6,538	6,567	6,596	6,620	6,646	6,671	6,671	367	40	56.85
B Total Surplus Pupil Spaces																			0	0	0.00

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Existing Site Size	# of Portables		
																				ROND	# of Portables
C1																					
C2																					
C3																					
C4																					
C5																					
C6																					
C7																					
C8																					
Totals																					
C Total Pupil Spaces Available to Accommodate Growth																			0	0	0.00

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PE07



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024
Elementary Review Area: PE07

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

	Projected Housing Growth													Total Yr. 15 Growth-related Pupils		
	Total HoPPP	Weighted/ Blended Elementary Yield													Total Net New Units 2038/39	
	Low Density	Medium Density	High Density - Apartments	Total Net Dwelling Units												
1. 257 Jones Rd. elementary site	760			Year 10: 2033/34	Year 9: 2032/33	Year 8: 2031/32	Year 7: 2030/31	Year 6: 2029/30	Year 5: 2028/29	Year 4: 2027/28	Year 3: 2026/27	Year 2: 2025/26	Year 1: 2024/25	0.2620	465	122
2.				Year 10: 2033/34	Year 9: 2032/33	Year 8: 2031/32	Year 7: 2030/31	Year 6: 2029/30	Year 5: 2028/29	Year 4: 2027/28	Year 3: 2026/27	Year 2: 2025/26	Year 1: 2024/25	0.3130	1,594	495
3.				Year 10: 2033/34	Year 9: 2032/33	Year 8: 2031/32	Year 7: 2030/31	Year 6: 2029/30	Year 5: 2028/29	Year 4: 2027/28	Year 3: 2026/27	Year 2: 2025/26	Year 1: 2024/25	0.0110	2,586	28
				Year 10: 2033/34	Year 9: 2032/33	Year 8: 2031/32	Year 7: 2030/31	Year 6: 2029/30	Year 5: 2028/29	Year 4: 2027/28	Year 3: 2026/27	Year 2: 2025/26	Year 1: 2024/25	0.1394	4,635	646

Review Area: PED7 - Winona

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

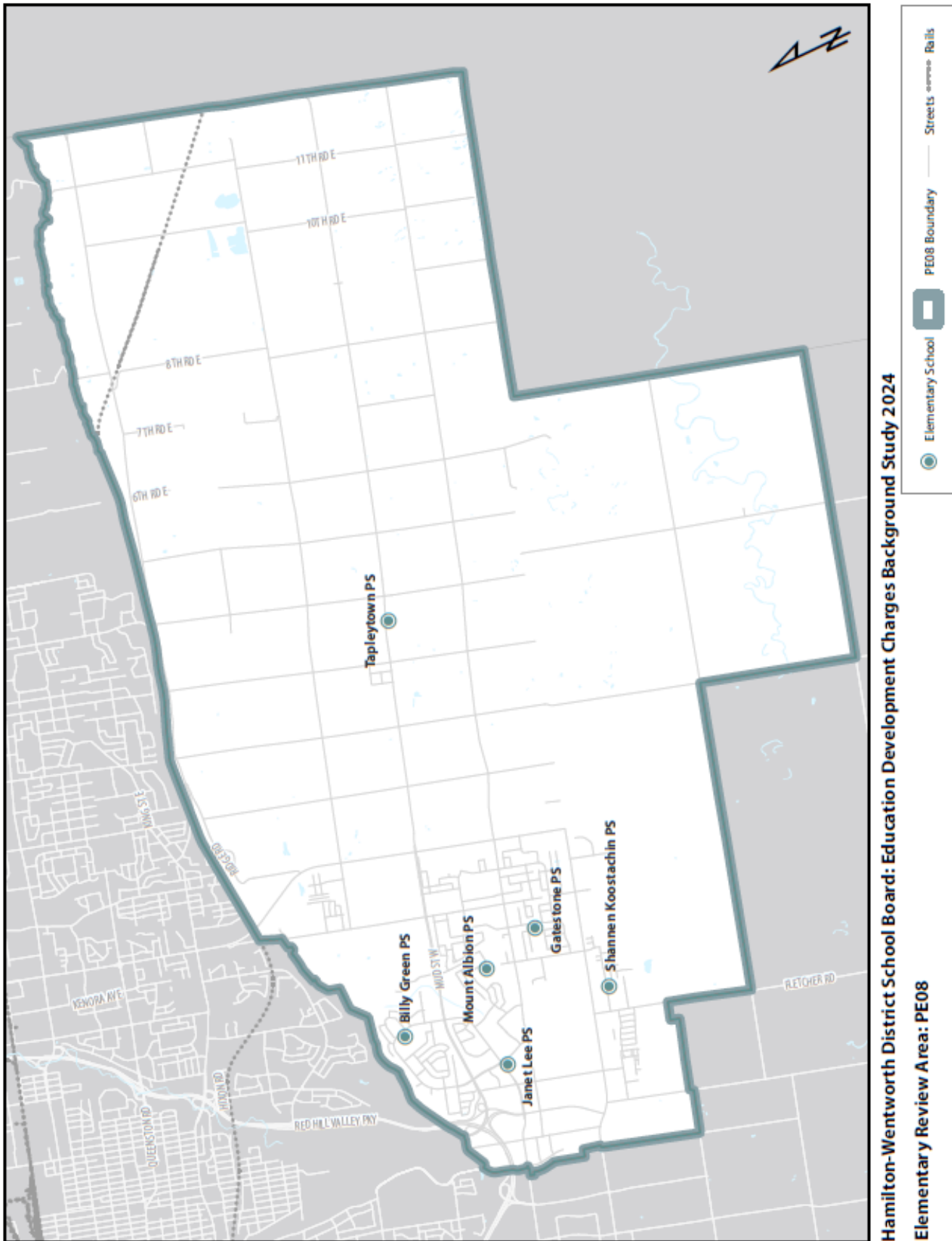
Review Area Schools	OT6 Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	# of Portables	Existing Site Size	
B1																				
B2																				
B3																				
B4																				
B5																				
B6																				
B7																				
B8																				
B9																				
B10																				
B11																				
B12																				
B13																				
B14																				
B15																				
Totals																				
Total ROND																		0		0.00
Total Surplus Pupil Spaces																		0		0.00

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	OT6 Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	# of Portables	Existing Site Size	
C1 Winona (K-8)	761	927	914	886	838	876	875	876	884	875	864	851	855	853	864	869	874			
C2			33	81	155	205	309	367	462	530	576	597	603	607	607	631	646			
C3																				
C4																				
C5																				
C6																				
C7																				
C8																				
C9																				
C10																				
Totals																				
Total Pupil Spaces Available to Accommodate Growth	761	927	997	966	1,033	1,080	1,184	1,244	1,346	1,406	1,439	1,448	1,468	1,466	1,481	1,500	1,521	0	8.16	
D Requirements of New Development for Growth Areas (Cumulative)				81	155	205	309	367	462	530	576	597	603	607	607	631	646	0		8.16

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PE08



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024
Elementary Review Area: PE08

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

1. 399 First Rd., Stony Creek elementary site (Nash site) owned - acquired in 2020	Projected Housing Growth															Total Yr. 15 Growth-related Pupils
	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	
Low Density	8	115	151	33	-	-	-	-	109	154	97	109	153	95	70	
Medium Density	-	149	282	228	88	70	-	102	209	209	170	200	67	-	-	
High Density - Apartments	242	98	206	205	184	184	184	184	184	153	374	375	414	232	-	
A Total Net Dwelling Units	250	362	639	466	88	70	184	381	286	556	641	684	634	327	76	

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Existing Site Size
B1 Billy Green E S (JK-8)	400	392	373	360	348	329	325	326	330	327	327	332	333	335	337	339	340	24
B2 Galesstone (JK-8, Spec Ed)	582	521	516	510	500	505	512	519	518	517	519	524	527	529	531	534	537	17
B3 Tapscott PS (JK-8, Prog. of Choice 7/8)	291	511	536	530	541	557	569	581	586	599	606	590	593	596	600	603	606	257
B4																		10
B5																		4.27
B6																		0
B7																		4.63
B8																		10
B9																		5.44
B10																		
Totals	1,273	1,424	1,424	1,400	1,389	1,391	1,406	1,427	1,435	1,443	1,452	1,446	1,453	1,461	1,467	1,476	1,483	298
Total ROND																		11
Total Surplus Pupil Spaces																		14.34

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	Existing Site Size
C1 Janet Lee PS (JK-8)	378	472	487	524	510	521	524	526	532	526	526	514	518	522	525	531	536	4
C2 Mount Albion PS (JK-8, Spec Ed)	522	516	512	483	33	33	33	33	35	37	39	41	45	51	53	56	56	56
C3 Shamen Kostachin (JK-8)	599	835	638	637	644	634	626	622	627	629	634	642	648	653	660	666	673	3
C4																		9
C5																		8.04
C6																		
C7																		
C8																		
Totals	1,499	1,823	1,642	1,718	1,700	1,773	1,757	1,749	1,769	1,768	1,761	1,885	1,986	2,089	2,157	2,190	2,232	16
Total Pupil Spaces Available to Accommodate Growth																		24.09
Requirements of New Development for Growth Areas (Cumulative)				63	122	124	124	124	136	148	150	257	346	437	491	509	536	

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Elementary Form G

Form G - Growth-related Elementary Net Education Lands Costs

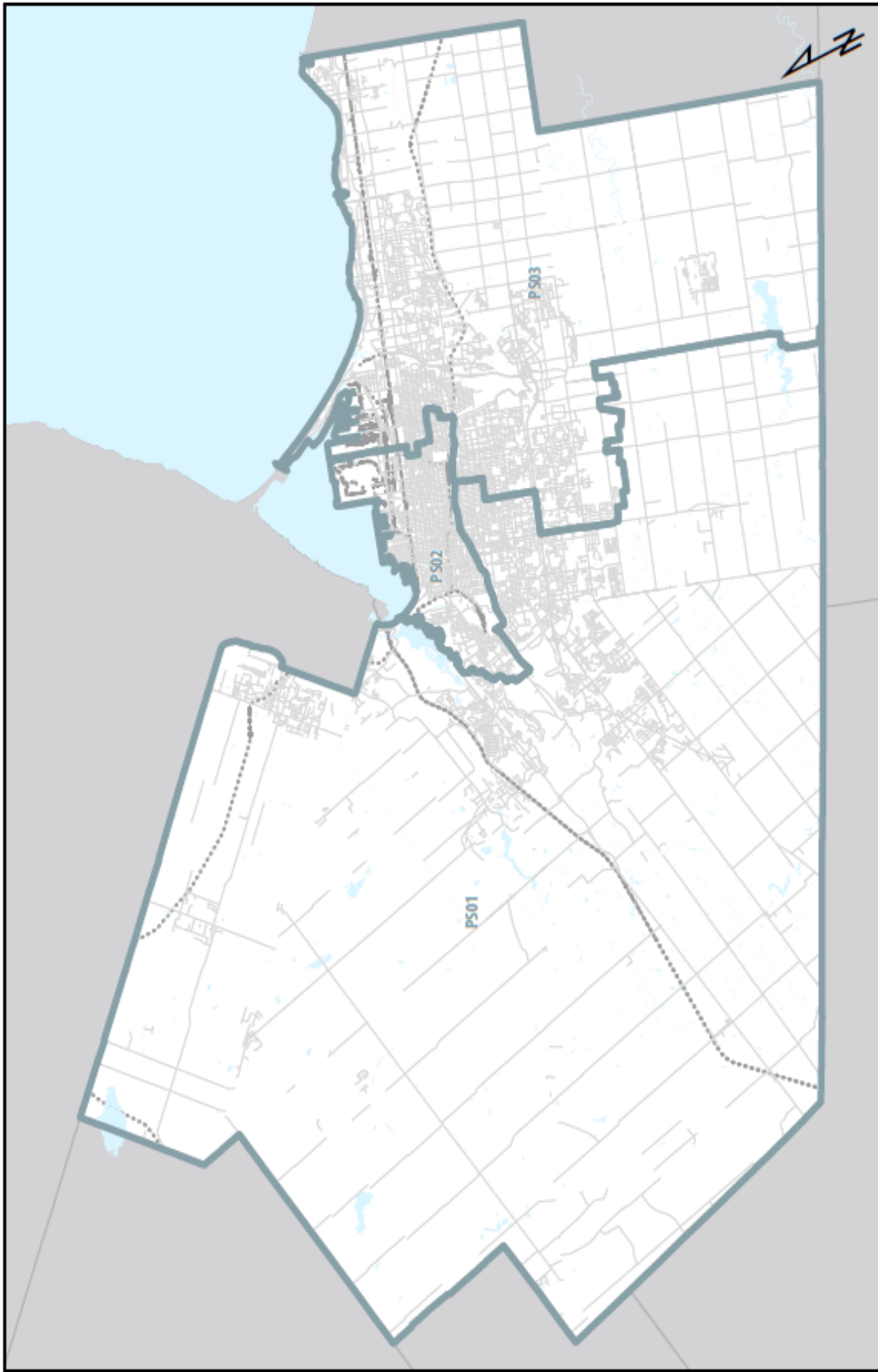
Review Area	Description of Growth-related Site Acquisition Needs	Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs
PE01	Elementary site Mountain View Heights site (Skinner Rd.Great Falls Blvd) (Waterdwn Bay site)	Owned	2024	646	500	100%	6.00	6.00	\$ 1,726,936	\$ 10,361,617
PE02	Elementary site south Ancaster - Mount Hope area	TBD	2034	579	625	93%	7.00	6.48	\$ 2,750,000	\$ 17,823,960
PE03	Binbrook II (3105 Fletcher Rd.)	P&S in Progress	2024	617	615	100%	6.00	6.00	\$ 2,750,000	\$ 16,500,000
PE03	Binbrook III elementary site	TDB	2032	617	615	100%	6.00	6.00	\$ 2,750,000	\$ 16,500,000
PE07	257 Jones Rd. elementary site	designated	2028	760	700	100%	6.00	6.00	\$ 2,750,000	\$ 16,500,000
PE08	399 First Rd. West elementary site (Nash site)	Owned	2024	640	640	100%	6.00	6.00	\$ 1,346,916	\$ 8,081,496
PE08	Upper Stoney Creek elementary site	TBD	2033	94	640	15%	7.00	1.03	\$ 2,750,000	\$ 2,833,359
Total Elementary Education Land Costs				3,952	4,335		44.0	37.5		\$ 88,600,432

Form G - Growth-related Elementary Net Education Lands Costs - cont'd

Review Area	Description of Growth-related Site Acquisition Needs	Education Land Costs	Education Land Costs previously funded from EDC account	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Financing Costs	Total Education Land Costs
PE01	Elementary site Mountain View Heights site (Skinner Rd.Great Falls Blvd) (Waterdwn Bay site)	\$ 10,361,617	\$ (10,361,617)	\$ 1,206,524	\$ -	\$ 67,271	\$ 15,088	\$ 1,288,883
PE02	Elementary site south Ancaster - Mount Hope area	\$ 17,823,960	\$ -	\$ 1,303,335	\$ 11,209,393	\$ 501,502	\$ 365,282	\$ 31,203,472
PE03	Binbrook II (3105 Fletcher Rd.)	\$ 16,500,000	\$ -	\$ 1,206,524	\$ -	\$ 67,271	\$ 210,533	\$ 17,984,328
PE03	Binbrook III elementary site	\$ 16,500,000	\$ -	\$ 1,206,524	\$ 7,878,015	\$ 376,014	\$ 307,506	\$ 26,268,059
PE07	257 Jones Rd. elementary site	\$ 16,500,000	\$ -	\$ 1,206,524	\$ 3,555,853	\$ 213,275	\$ 254,382	\$ 21,730,034
PE08	399 First Rd. West elementary site (Nash site)	\$ 8,081,496	\$ (8,081,496)	\$ 1,206,524	\$ -	\$ 67,271	\$ 15,088	\$ 1,288,883
PE08	Upper Stoney Creek elementary site	\$ 2,833,359	\$ -	\$ 207,183	\$ 1,562,111	\$ 72,042	\$ 55,372	\$ 4,730,068
Total Elementary Education Land Costs		\$ 88,600,432	\$ (18,443,113)	\$ 7,543,135	\$ 24,205,372	\$ 1,364,649	\$ 1,223,251	\$ 104,493,727

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SECONDARY REVIEW AREAS

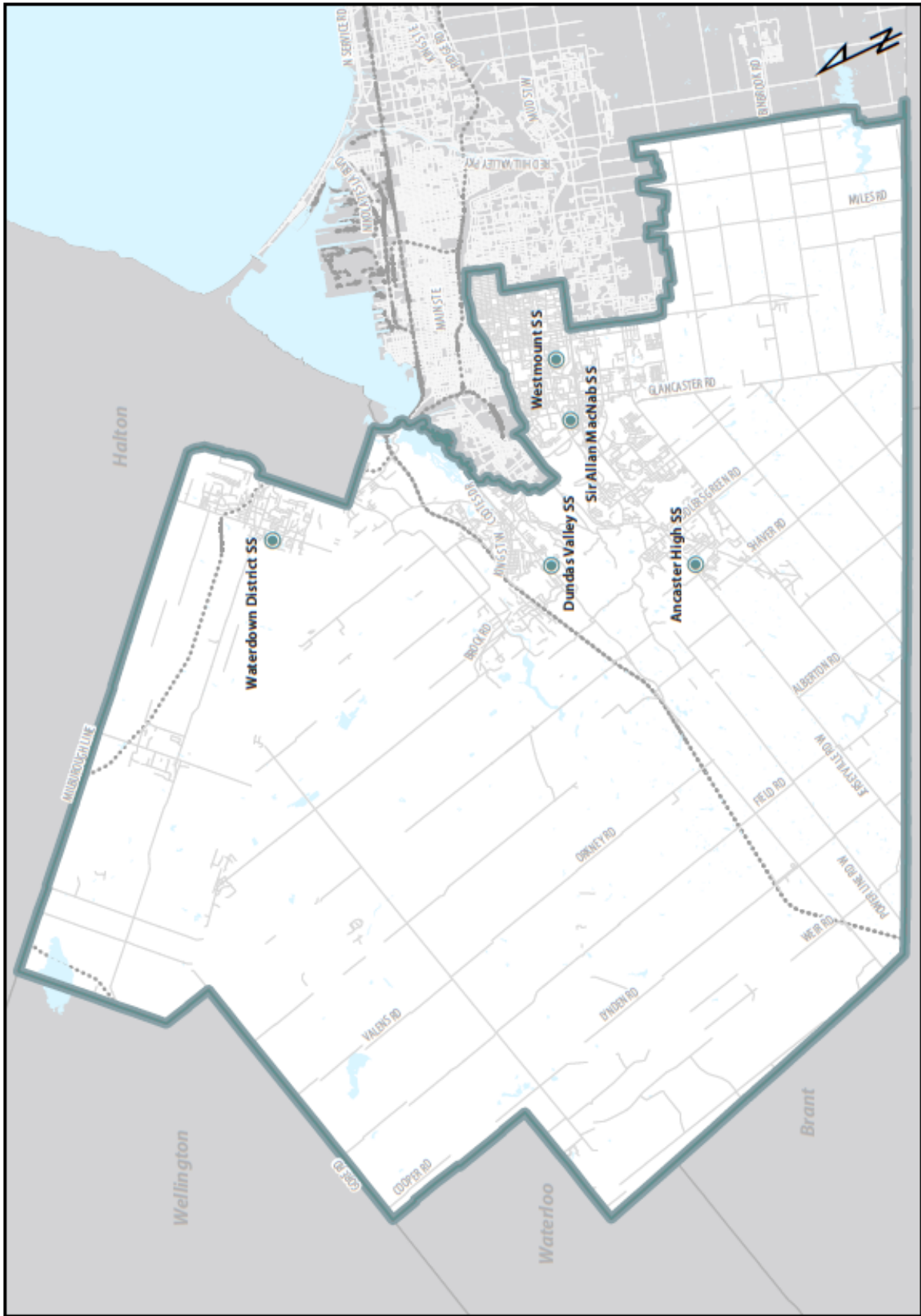


Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Secondary Review Area: Overview



Review Area Map PS01



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Secondary Review Area: PS01

Legend:

- Secondary School
- PS01 Boundary
- Streets
- Rails

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

1. No growth-related site needs	Projected Housing Growth															Total Yr. 15 Growth-related Pupils
	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	
2.	Total MRPP															138
3.	Total Net Dwelling Units															135
	Total Net Dwelling Units															52
	Total Net Dwelling Units															325

Review Area: PS01 - Ancaster, Hamborough, Dundas & Hamilton Mountain West

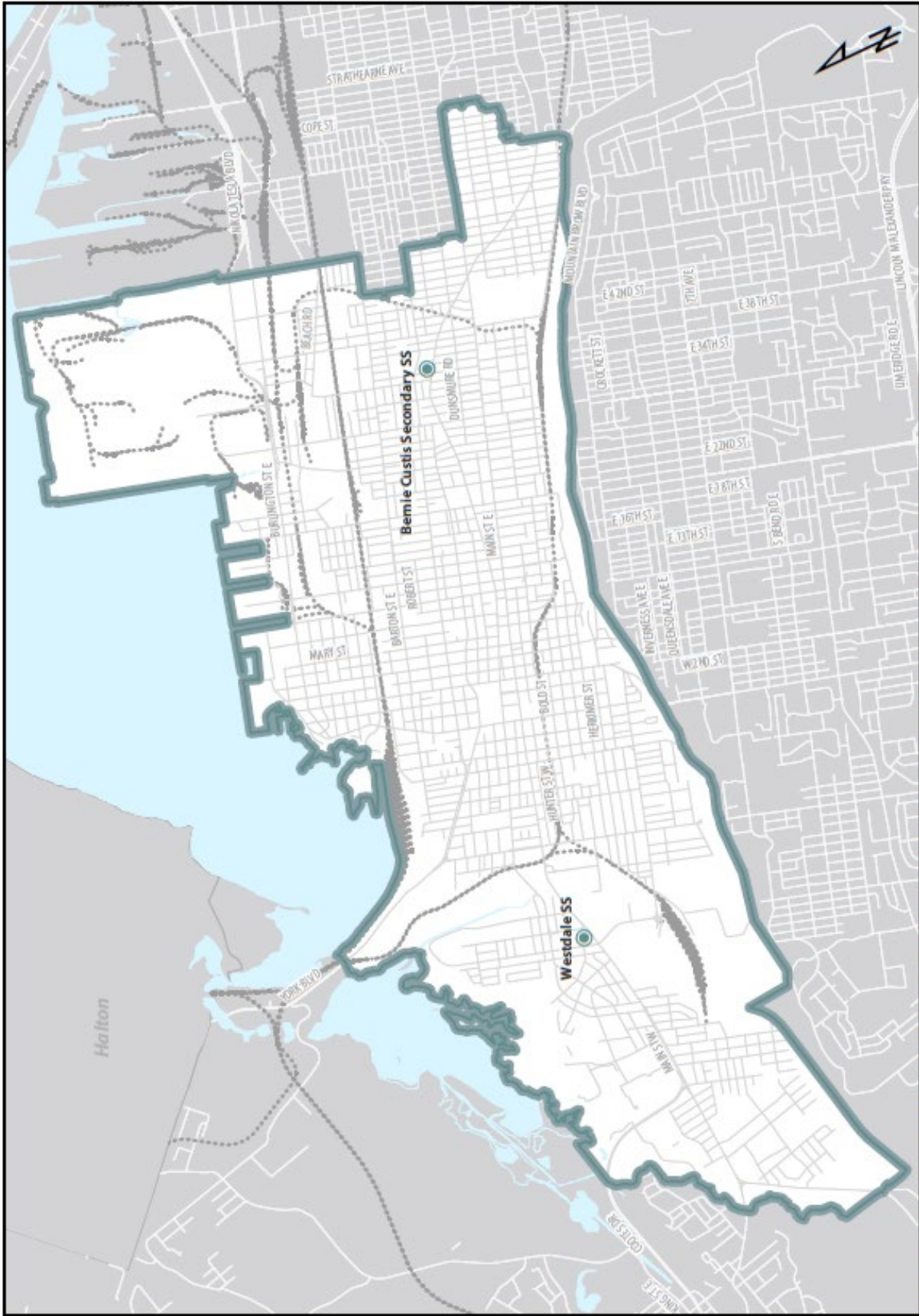
OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	# of Portables	Existing Site Size
1,191	872	828	814	812	760	761	746	740	746	761	794	796	808	814	812	816	5	16.59
1,254	1,317	1,323	1,316	1,305	1,337	1,333	1,352	1,345	1,347	1,345	1,346	1,340	1,332	1,329	1,332	1,337	0	17.84
1,398	1,190	1,233	1,249	1,303	1,318	1,329	1,313	1,302	1,274	1,261	1,265	1,264	1,255	1,240	1,249	1,252	87	42.97
1,474	709	652	617	687	688	687	737	698	701	689	686	679	680	681	678	682	137	26.06
1,817	1,213	1,202	1,210	1,218	1,248	1,317	1,321	1,355	1,328	1,242	1,183	1,142	1,082	1,119	1,127	1,132	96	18.56
7,134	5,201	5,236	5,206	5,385	5,351	5,427	5,449	5,439	5,396	5,297	5,223	5,221	5,158	5,183	5,198	5,217	325	122.02
8	8	42	72	88	88	104	114	144	171	182	206	227	253	270	296	325		
1,883	1,890	1,886	1,877	1,895	1,895	1,893	1,971	1,952	1,957	1,855	1,655	1,687	1,723	1,681	1,640	1,592		

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	# of Portables	Existing Site Size
1,191	872	828	814	812	760	761	746	740	746	761	794	796	808	814	812	816	5	16.59
1,254	1,317	1,323	1,316	1,305	1,337	1,333	1,352	1,345	1,347	1,345	1,346	1,340	1,332	1,329	1,332	1,337	0	17.84
1,398	1,190	1,233	1,249	1,303	1,318	1,329	1,313	1,302	1,274	1,261	1,265	1,264	1,255	1,240	1,249	1,252	87	42.97
1,474	709	652	617	687	688	687	737	698	701	689	686	679	680	681	678	682	137	26.06
1,817	1,213	1,202	1,210	1,218	1,248	1,317	1,321	1,355	1,328	1,242	1,183	1,142	1,082	1,119	1,127	1,132	96	18.56
7,134	5,201	5,236	5,206	5,385	5,351	5,427	5,449	5,439	5,396	5,297	5,223	5,221	5,158	5,183	5,198	5,217	325	122.02
8	8	42	72	88	88	104	114	144	171	182	206	227	253	270	296	325		
1,883	1,890	1,886	1,877	1,895	1,895	1,893	1,971	1,952	1,957	1,855	1,655	1,687	1,723	1,681	1,640	1,592		

Note: The Board is excluding any available capacity utilized for holding situations and where spare capacity is not available for accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PS02



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Secondary Review Area: PS02

-  Secondary School
-  PS02 Boundary
-  Streets
-  Rails

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024

1. No growth-related site needs	Projected Housing Growth															Total Yr. 15 Growth-related Pupils
	Total (NGRPP)															
0																63
2. Medium Density																442
3. High Density - Apartments																19,570
	Total Net Dwelling Units															20,075
																139

Review Area: P502 - Lower Hamilton Central & West

Projected Housing Growth	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39
Low Density	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Medium Density	1,939	1,025	1,027	1,377	1,349	1,686	1,292	1,443	800	751	1,367	1,129	1,132	1,859	1,337
High Density - Apartments	1,939	1,032	1,034	1,377	1,352	1,686	1,455	1,500	1,060	780	1,379	1,129	1,137	1,873	1,352
Total Net Dwelling Units															

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

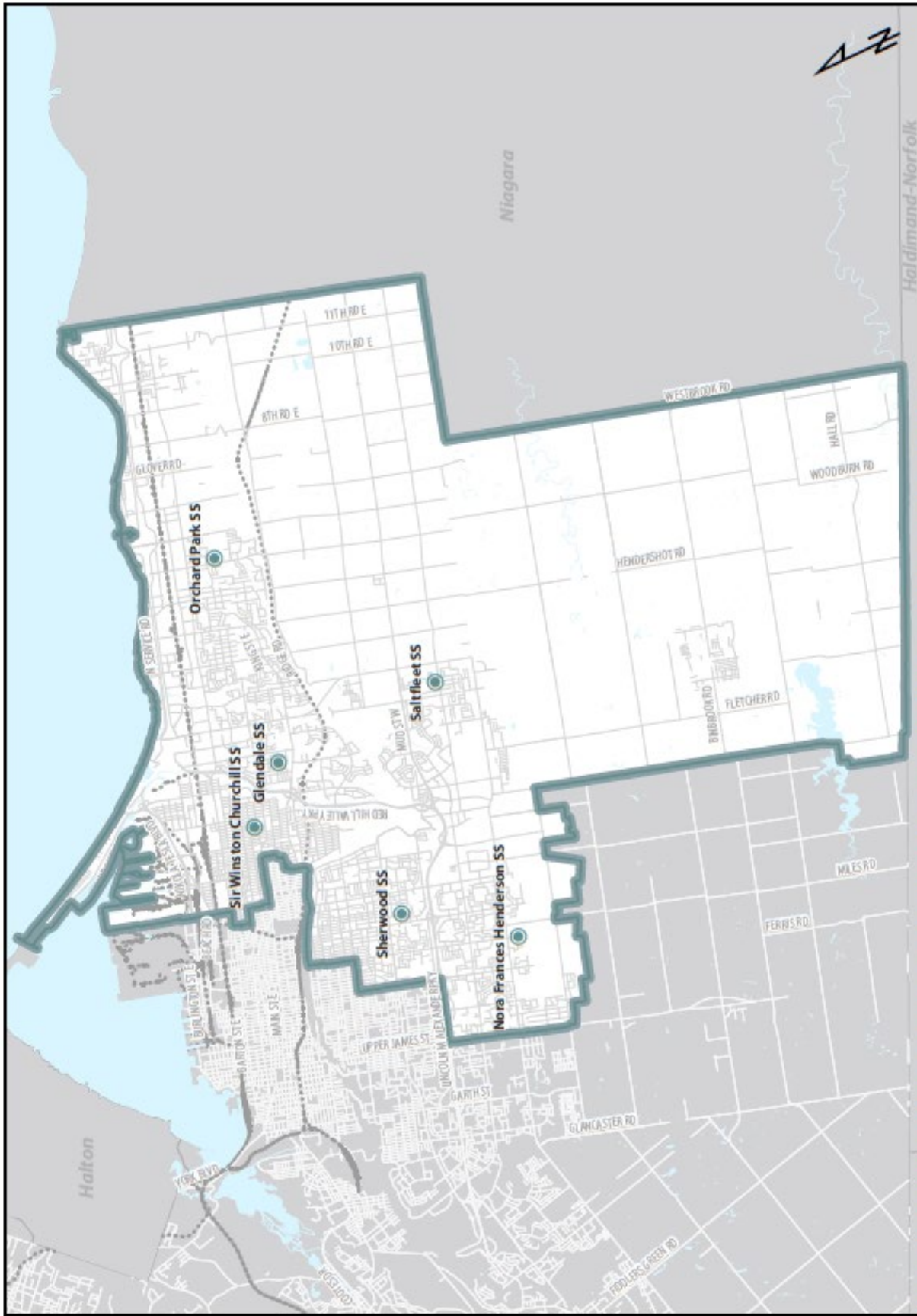
Review Area Schools	Current	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39
B1 Bernie Custis SS	1,340	981	1,018	1,011	1,050	1,030	998	1,005	1,023	1,033	1,086	1,082	1,072	1,064	1,067	1,070
B2 Westdale (Gr 9-12, Spec Ed)	1,997	1,527	1,565	1,592	1,581	1,526	1,561	1,538	1,543	1,555	1,561	1,558	1,583	1,573	1,581	1,584
B3																
B4																
B5																
B6																
B7																
B8																
B9																
B10																
Totals	2,337	2,508	2,583	2,603	2,631	2,556	2,559	2,542	2,565	2,588	2,607	2,639	2,655	2,637	2,648	2,654
Total ROND																
Total Surplus Pupil Spaces	429	343	277	311	275	342	329	332	300	259	193	193	171	182	159	144

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	Current	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39
C1																
C2																
C3																
C4																
C5																
C6																
C7																
C8																
Totals																
Total Pupil Spaces Available to Accommodate Growth																
Requirements of New Development for Growth Areas (Cumulative)																
ROND																
Total	139	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Review Area Map PS03



Hamilton-Wentworth District School Board: Education Development Charges Background Study 2024

Secondary Review Area: P503

Secondary School PS03 Boundary Streets Rails

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD - FORMS E AND F
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2024**

	Projected Housing Growth														Weighted/ Blended Secondary Yield	Total Net New Units 2028/29	Total Yr. 15 Growth- related Pupils	
	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38				Year 15 2038/39
1. New secondary site in Elfrida area															0.1064	2,924	311	
															0.0776	6,621	481	
2.															0.0056	23,493	132	
3.															0.0279	33,038	923	
Review Area: P503 - Gianbrook, Upper Stoney Creek, East Mountain, Lower Hamilton East, Lower Stoney Creek & Winona																		
Projected Housing Growth																		
Low Density	113	252	255	49	71	84	57	60	80	355	259	243	351	383	312	0.1064	2,924	311
Medium Density	381	750	985	484	644	452	431	298	225	563	574	569	248	8	9	0.0776	6,621	481
High Density - Apartments	1,151	1,600	1,550	1,905	1,659	1,523	933	1,628	2,436	2,089	1,921	1,899	1,302	740	1,157	0.0056	23,493	132
A. Total Net Dwelling Units	1,645	2,602	2,790	2,438	2,374	2,059	1,421	1,986	2,741	3,007	2,754	2,711	1,901	1,131	1,478			

Review Area Schools not Impacted by New Housing Development, or for which no Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	# of Portables	Existing Site Size
B1 Sherwood SS (Gr 9-12, Fl. Spec Ed)	1,500	1,306	1,332	1,321	1,375	1,359	1,366	1,407	1,384	1,378	1,391	1,390	1,404	1,396	1,432	1,405	1,412	21	12.53
B2 Slendale (Site leased) (Gr 9-12, Spec Ed)	1,146	1,190	1,292	1,317	1,314	1,396	1,363	1,365	1,416	1,378	1,427	1,453	1,401	1,410	1,333	1,324	1,328	69	14.61
B3 Sir Winston Churchill SS (Gr 9-12, Spec Ed)	1,284	789	807	851	831	817	816	841	824	837	848	825	837	861	838	851	853	39	9.84
B4 Nova Frances Henderson Secondary (New Site) (Gr 9-12, Spec Ed)	1,357	1,323	1,363	1,273	1,158	1,176	1,151	1,108	1,114	1,139	1,116	1,144	1,123	1,113	1,079	1,109	1,110	110	20.52
B6 Orchard Park SS (Gr 9-12, Spec Ed)	1,456	1,078	1,084	1,102	1,066	1,087	1,080	1,057	1,039	1,020	1,095	1,101	1,097	1,103	1,082	1,064	1,068	218	14.48
B6																			
B7																			
B8																			
B9																			
B10																			
Totals	6,745	5,686	5,878	5,863	5,748	5,935	5,776	5,777	5,777	5,751	5,838	5,911	5,861	5,884	5,774	5,752	5,771	458	71.98
Total ROND	22	63	106	134	189	229	239	270	270	303	332	362	385	406	426	440	458	0	20.52
Total Surplus Pupil Spaces	1,059	846	846	820	781	776	781	799	698	690	575	472	499	455	546	552	516	0	14.61

Review Area Schools Impacted by Housing Growth and for which additional Growth-related Accommodation Solutions are Required

Review Area Schools	OTG Capacity	Current 2023/24	Year 1 2024/25	Year 2 2025/26	Year 3 2026/27	Year 4 2027/28	Year 5 2028/29	Year 6 2029/30	Year 7 2030/31	Year 8 2031/32	Year 9 2032/33	Year 10 2033/34	Year 11 2034/35	Year 12 2035/36	Year 13 2036/37	Year 14 2037/38	Year 15 2038/39	# of Portables	Existing Site Size
C1 Saltfleet HS (Gr 9-12) (Leetle Park, Elfrida)	1,283	1,283	1,372	1,432	1,447	1,502	1,501	1,566	1,473	1,461	1,444	1,428	1,426	1,404	1,385	1,408	1,410	465	15.00
C2																			
C3																			
C4																			
C5																			
C6																			
C7																			
C8																			
Totals	1,283	1,283	1,395	1,501	1,579	1,659	1,666	1,676	1,643	1,632	1,625	1,667	1,725	1,773	1,806	1,856	1,875	465	15.00
Total Pupil Spaces Available to Accommodate Growth																			

D Requirements of New Development for Growth Areas (Cumulative)	69	132	157	166	171	170	171	181	239	300	369	421	448	465
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Note: The Board is excluding any available capacity utilized for holding situations and where a permanent accommodation solution is sought, as well as any available capacity that doesn't meet longer term capital priority needs due to distance.

Secondary Form G

Form G - Growth-related Secondary Net Education Lands Cos

Review Area	Description of Growth-related Site Acquisition Needs	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
PS03	new secondary site in Elfrida area	TBD	2037	592	1,245	48%	15.00	7.14	\$ 2,750,000	\$ 19,627,711
Total Secondary Education Land Costs				592	1,245		15.0	7.1		\$ 19,627,711

Form G - Growth-related Secondary Net Education Lands Costs - cont'd

Review Area	Description of Growth-related Site Acquisition Needs	Education Land Costs	Education Land Costs previously funded from EDC account	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Financing Costs	Total Education Land Costs
PS03	new secondary site in Elfrida area	\$ 19,627,711	\$ -	\$ 1,435,230	\$ 17,383,265	\$ 663,068	\$ 463,254	\$ 39,572,528
Total Secondary Education Land Costs		\$ 19,627,711	\$ -	\$ 1,435,230	\$ 17,383,265	\$ 663,068	\$ 463,254	\$ 39,572,528

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
Education Development Charges Submission 2024
Form H1 - EDC Calculation - Uniform Residential and Non-Residential

Determination of Total Growth-Related Net Education Land Costs

Total	15-Year Education Land Costs (Form G)	\$ 138,314,346
Add:	EDC Financial Obligations (Form G)	\$ 6,576,854
	Positive EDC Account Balance	\$ -
Subtotal	Growth-Related Net Education Land Costs	\$ 144,891,200
Add	EDC Study Costs	\$ 520,000
Total	Growth-Related Net Education Land Costs	\$ 145,411,200

Apportionment of Total 15-Year Growth-Related Net Education Land Costs

Total Growth-Related Net Education Land Costs to be Attributed to Non-Residential Development (Maximum 40%)	15%	\$ 21,811,680
Total Growth-Related Net Education Land Costs to be Attributed to Residential Development	85%	\$ 123,599,520

Calculation of Uniform Residential Charge

Residential Growth-Related Net Education Land Costs	\$ 123,599,520
Net New Dwelling Units (Form C)	60,588
Uniform Residential EDC per Dwelling Unit	\$ 2,040

Calculation of Non-Residential Charge - Based on Board Determined GFA

Non-Residential Growth-Related Net Education Land Costs		\$ 21,811,680
GFA Method	Non-Exempt Board-Determined GFA (Form D)	21,265,271
	Non-Residential EDC per Square Foot of GFA	\$ 1.03

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
 Ontario Ministry of Education
 Education Development Charges Submission 2024
 Form H2 - EDC Calculation - Differentiated Residential and Non-Residential

Residential Growth-Related Net Education Land Cost \$ 123,599,520

City of Hamilton Differentiated Jurisdiction-wide Rate
 Determination of Distribution of New Development

Type of Development (Form B)	Net New Units (Form B & C)	15-Year Elementary Pupil Yield (Form E)	Elementary Gross Requirements of New Development	Distribution of Elementary Gross Requirements of New Development	15-Year Secondary Pupil Yield (Form E)	Secondary Gross Requirements of New Development	Distribution of Secondary Gross Requirements of New Development	Total Gross Requirements of New Development	Distribution Factor
Low Density	4,339	0.3153	1,368	30.92%	0.1048	455	32.79%	1,823	31.36%
Medium Density	9,249	0.2682	2,481	56.06%	0.0691	639	46.05%	3,119	53.67%
High Density	52,412	0.0110	577	13.03%	0.0056	294	21.16%	870	14.97%
Total Units	66,000	0.0671	4,425	100.00%	0.0210	1,387	100.00%	5,813	100.00%

Jurisdiction-wide Cost per Dwelling Unit \$2,040

Calculation of Differentiated Charge Based on Pupil Yields per Unit:

Type of Development (Form B)	Apportionment of Residential Net Education Land Cost by Development Type	Net New Units	Differentiated Residential EDC per Unit by Development Type
Low Density	\$38,764,966	4,339	\$ 8,934
Medium Density	\$66,333,714	9,249	\$ 7,172
High Density	\$18,500,840	52,412	\$ 353
Total EDC Revenue Generated:	\$123,599,520	66,000	

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APPENDIX B - DRAFT EDC BY-LAW

HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD EDUCATION DEVELOPMENT CHARGES BY-LAW NO. 24-1

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 as amended from time to time.
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 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” means any activity or proposed activity in respect of land that requires one or more of the actions referred to in sections 6 or 10 of this by-law, and includes redevelopment, expansion, extension or alteration, or any two or more of them, of a use, building or structure;
 - (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 i) sanitary facilities and culinary facilities are provided in the same building or a related development (whether or not for the exclusive use of such person or persons or in common with others living together); and, ii) includes a separate, private entrance leading directly from outside the building or from a common hallway, elevator or stairway inside the building; and shall include, but is not limited to, a dwelling unit or units in an apartment, lodging home, rooming house, group home, seniors’ residence, mobile home, duplex, triplex, semi-detached dwelling, row house, single detached building, stacked townhouse and townhouse. Notwithstanding the foregoing, i) a unit or room in a temporary accommodation to the travelling or vacationing public (provided only that such unit or room is used exclusively for temporary accommodation to the travelling or vacationing public and for no other purpose), and ii) living accommodation in a nursing home as defined in and governed by the provisions of the *Long-Term Care Homes Act, 2007*, S.O. 2007, c.8 shall not constitute dwelling units;

- (f) “education development charge” means charges imposed pursuant to this by-law in accordance with the Act;
- (g) “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);
 - (v) To undertake Alternative Projects (as defined in Section 257.53 of the Act) as may be approved by the Minister of Education; or,
 - (vi) To undertake studies in connection with an acquisition referred to in paragraph (i).
- (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; and,
 - (B) in or 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 but reasonably necessary 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.

4.

- (a) Subject to section 4(b) to 4(f) inclusive, 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 as defined in section 1(1) of the Act;
 - (iii) a public hospital receiving aid under the *Public Hospitals Act* R.S.O. 1990, c. P.40;
 - (iv) Metrolinx, or a predecessor or successor corporation identified under the *Metrolinx Act, 2006* S.O. 2006, c.16 as amended from time to time, save and except any portion of the development used for a residential or retail use, in which case the education development charge shall apply to that part of the development; and,
 - (v) a 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 grounds, if the place of worship, churchyard, cemetery or burial grounds are exempt from taxation under section 3 of the *Assessment Act*.
- (c) Subject to subsection (d), an owner shall be exempt from education development charges if a development on its lands would construct, erect, or place a building or structure, or make an addition or alteration to a building or structure for one of the following purposes:
 - (i) a private school;
 - (ii) a long-term care home, as defined in the *Long-Term Care Homes Act, 2007*;
 - (iii) a retirement home, as defined in the *Retirement Homes Act, 2010*;
 - (iv) a hospice or other facility that provides palliative care services;
 - (v) a child care centre, as defined in the *Child Care and Early Years Act, 2014*;
 - (vi) a memorial home, clubhouse or athletic grounds owned by the Royal Canadian Legion.
- (d) If only a portion of a building or structure, or an addition or alteration to a building or structure, referred to in subsection (c) will be used for a purpose identified in that

subsection, only that portion of the building, structure, addition or alteration is exempt from an education development charge.

- (e) An owner shall be exempt from education development charges if the owner is:
 - (i) A college of applied arts and technology established under the *Ontario Colleges of Applied Arts and Technology Act, 2002*;
 - (ii) A university that receives regular and ongoing operating funds from the Government of Ontario for the purposes of post-secondary education;
 - (iii) An Indigenous Institute prescribed for the purposes of section 6 of the *Indigenous Institutes Act, 2017*.
- (f) This by-law shall not apply to non-residential agricultural buildings or structures that are owned by and are used for the purpose of a bona fide farming operation on the same site.

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 in accordance with Schedule “A” hereto 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. An education development charge will be collected once in respect of a particular residential development, but this does not prevent the application of this by-law to future development of the same property.

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	A residential building not in another class of residential building described in this table.	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 per Schedule “B” hereto in an 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. An education development charge will be collected once in respect of a particular non-residential development, but this does not prevent the application of this by-law to future development of the same property.

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 (i) by the amount of the enlargement.
- (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.

- (a) Where it appears to the Board that the land values underlying the education development charge calculation are predicting higher costs than the Board is generally experiencing over a period of time sufficient to show the discrepancy with

a reasonable degree of assurance, the Board shall consider a motion to study amending the By-law to increase the charge.

- (b) Where it appears to the Board that the land values underlying the education development charge calculation are predicting lower costs than the Board is generally experiencing over a period of time sufficient to show the discrepancy with a reasonable degree of assurance, the Board shall consider a motion to study amending the By-law to reduce the charge.

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 **July 1, 2024**.

Expiration

23. This by-law shall expire on **June 30, 2029** unless it is repealed at an earlier date.

Repeal

24. Hamilton-Wentworth District School Board By-law 19-1 is repealed at 11:59 p.m. on June 30, 2024.

Severability

25. 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

26. 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

27. This by-law may be cited as the Hamilton-Wentworth District School Board Education Development Charges By-law No. 24-1.

ENACTED AND PASSED this **DATE** Day of June, 2024.

Maria Felix Miller
Board Chair

Sheryl Robinson Petrazzini
Director of Education and Board Secretary

SCHEDULE “A” TO

**HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD
EDUCATION DEVELOPMENT CHARGES BY-LAW 24-1
RESIDENTIAL EDUCATION DEVELOPMENT CHARGES**

	July 1, 2024- June 30, 2025	July 1, 2025- June 30, 2026	July 1, 2026- June 30, 2027	July 1, 2027- June 30, 2028	July 1, 2028- June 30, 2029
Residential Education Development Charge per dwelling unit	\$1,873	\$2,040	\$2,040	\$2,040	\$2,040

SCHEDULE “B” TO

NON-RESIDENTIAL EDUCATION DEVELOPMENT CHARGES

	July 1, 2024- June 30, 2025	July 1, 2025- June 30, 2026	July 1, 2026- June 30, 2027	July 1, 2027- June 30, 2028	July 1, 2028- June 30, 2029
Non-Residential Education Development Charge per square foot of gross floor area	\$0.60	\$0.70	\$0.80	\$0.90	\$1.00

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APPENDIX C - BACKGROUND DOCUMENT PERTAINING TO A REVIEW OF THE EDUCATION DEVELOPMENT CHARGES POLICIES OF THE HAMILTON-WENTWORTH DISTRICT SCHOOL BOARD

The policy review document outlined herein is intended to provide the reader with an overview of the education development charge policies underlying the existing 2019 EDC by-law of the Hamilton-Wentworth District School Board 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.”

The legislative provisions require the Board 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.

C.1 Existing HWDSB EDC By-law

On June 17, 2019, the Hamilton-Wentworth District School Board (HWDSB) adopted a successor EDC by-law governing development and redevelopment within the City of Hamilton, and over a 5-year term. The successor by-law rates were imposed beginning July 6, 2019. On March 29, 2019 the Province had advised school boards that changes were enacted to the education development charges legislation. The by-law adopted on June 17th reflected the legislative changes adopted by the Province on March 29th.

C.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 Hamilton-Wentworth District School Board proposed EDC by-law. The Board of Trustees, after consideration of public input, will make decisions on each of these policy issues prior to passage of a successor by-law anticipated to occur on Monday June 17, 2024.

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, subject to the legislative rate cap?
2. Are the charges to be applied on an area-specific or jurisdiction-wide basis?
3. Does the Board wish to exempt any residential or non-residential development?
4. Does the Board wish to provide any demolition or conversion credits beyond that specified in the legislation?
5. What by-law term is proposed by the Board; five years, or something less?
6. Has the Board given consideration to the potential for Alternative Projects?

C.2.1 Percentage of Growth-Related Net Education Land Costs to be Borne through EDCs

Changes to the legislation have established a ‘legislative cap’ on the residential and non-residential EDC rate that can be imposed under an EDC by-law. Annual residential EDC rate increases are limited to the greater of 5% or \$300 more than the most recent by-law-imposed rate. Annual non-residential rate increases are limited to the greater of 5% and \$0.10 per square foot added to the most recent by-law-imposed rate. While the legislative cap takes precedence over the policy decision respecting residential and non-residential shares of net education land costs, the ability to shift the percentage shares between the two development categories is dependent upon the difference between the calculated and the cap rates being more than 5% per annum over the term of the by-law, without additional revenue loss.

In addition, O. Reg. 20/98 section 7 paragraphs 9 (iii) and 11 (ii) restricts a board to a maximum of 100% recovery of the “net” growth-related education land costs from residential and non-residential development., even though the legislative ‘cap’ limits the board’s ability to recover 100% of the net education land costs in many cases.

Under the current capital funding model, a school board must seek Ministerial approval to acquire land and to construct any pupil places that would serve to accommodate increased enrolment generated by new housing development. In deriving “net” growth-related education land costs, there are several additional impediments to full cost recovery, and beyond the ‘legislative cap’:

- non-statutory exemptions granted by a school board, restrict full cost recovery;
- additional statutory exemptions have been added to the EDC legislation since 2019. Additional exemptions for secondary dwellings that are constructed on the same property but not within the original dwelling unit, may generate additional students. The coterminous Hamilton-Wentworth boards will need to decide whether or not to apply EDCs to this type of development, as a discretionary exemption;
- there are restrictions on the number of acres of land that a board can fund through an EDC by-law. Zoning requirements, site plan controls and changes to program offering

(e.g., child care within schools increasing parking requirements, the provision of full-day kindergarten, etc.) make it more difficult to meet all of these legislative and regulatory needs and still provide adequate outdoor space for students, where these lands fall outside of the maximum site size benchmark;

- the determination of growth-related site needs is based on On-the-Ground (OTG) capacity (an assessment of classroom loading), which may not reflect the functional capacity of classroom use from a program perspective. For example, secondary classrooms are loaded at 23 students per classroom, for the purposes of determining growth-related site needs;
- all Boards with EDC by-laws in place, have calculated their EDC rates to derive 100% cost recovery, where possible, 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). EDC boards will have to consider whether they wish to continue the practice of exempting these non-statutory exemptions;
- as a larger percentage of urban development becomes redevelopment, there is additional revenue loss, as replacement units that meet the demolition grace period are exempted from the imposition of EDCs and there is no basis for determining how new residential permits will be redevelopment units.

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, and there is no legislative ability to pass the shortfall onto future development. Legal advisors are consistently of the opinion that granting 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.

The HWDSB’s 2019 EDC by-law recovers net education land costs from residential development (85%) and non-residential development (15%) within the jurisdiction.

Public Input Received with Respect to this Policy:

None to date

C.2.2 Jurisdiction-wide vs. Area Municipal (or Sub-area) Charges

Existing EDC By-law Provisions:

The existing “in force” EDC by-law is applied on a jurisdiction-wide uniform basis and has been since the legislation was enacted in 1998. 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 the Board;
2. A jurisdiction-wide charge affords more flexibility to the Board to meet its long-term accommodation needs;
3. Uniform application of education development charges is more congruent with the education funding model as a whole;
4. 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 and this is particularly problematic given school choice at the secondary level.

Public Input Received with Respect to this Policy:

None to date

Legislative Provisions:

Section 257.54 subsection (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 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 board staff 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 structure 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 or municipal-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 development 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 aging infrastructure, demographic shifts and 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 each by-law and may only use the funds to pay for growth-related net education land costs in that by-law area;
- 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. Further the average costing approach to determining net education land costs ensures that all development, regardless of location within the jurisdiction, pays the same rate.

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 area-specific by-laws 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, particularly as the differential between land values in one area versus another continues to increase;
- The precedent for levying uniform municipal development charges for “soft services” (e.g., recreation, library) and stormwater management, is well established, and is currently used in existing DC by-laws by many 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. The cost averaging approach underlying jurisdiction-wide by-laws has a greater ability to mitigate the impact on new house prices and support affordable housing policies;
- While today there are few area-specific (i.e., regional) 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.

C.2.3 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 a period chosen by the board of up to 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 are not recoverable from EDCs.

Further, a school board cannot make post by-law adoption discretionary exemptions without amending the EDC by-law first.

Finally, 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 (differentiated residential EDC rates), based on the percentage of the growth-related net education land costs to be applied to residential development that is to be funded by each type. The restrictions noted above would also apply in the case of differentiated residential EDC rates. Further, differentiated residential rates are complicated by the upset limit inherent in the ‘capped’ legislative 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 either at the time of initial occupancy, or subsequent re-occupation.

There would appear to be two options under the EDC legislation for dealing with variations in school age population per household, over time. However, neither solution is simple in real practice.

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. Finally, there is no ability to make up the funding shortfall as a result of exempting particular types of dwelling units.

While the Province has recently expanded the exemptions from municipal development charges for all secondary dwelling units, exempting the ancillary secondary units from the payment of education development charges would require a discretionary exemption and would require a funding allocation from the Ministry of Education to make up the shortfall.

The second alternative would be to differentiate the residential charge by type 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. Finally, as noted earlier, 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 typically 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-child 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.

Existing EDC by-law Provisions:

Currently, there are no by-law exemptions given for units that are marketed as “purpose-built seniors’ housing” or for affordable housing projects. The determination of pupils generated by new development does, however, take into consideration the minimal occupancy of adult lifestyle units by school age children.

- i. Historical data regarding school age children per household, which represents an “average” of all household occupancies, is a significant component of the projected elementary and secondary enrolment.
- ii. The EDC pupil yield analysis assesses changing headship rates and uses this information to modify the future expectations of the number of school age children per household.

C.2.4 Non-Statutory Non-residential Exemptions

Legislative Provisions:

Non-residential statutory exemptions include:

- h. land owned by, and used for the purposes of, a board or a municipality
- i. the construction or erection of any building or structure, or addition/alteration to a building or structure¹ in the case of:
 - a. private schools, the owner of a college of applied arts and technology established under the *Ontario Colleges of Applied Arts and Technology Act, 2002*
 - b. a long-term care home, as defined in the *Long-Term Care Homes Act, 2007*
 - c. a retirement home as defined in the *Retirement Homes Act, 2010*
 - d. a hospice or other facility that provides palliative care services
 - e. a child care centre, as defined in the *Child Care and Early Years Act, 2014*
 - f. a memorial homes, clubhouse or athletic grounds owned by the Royal Canadian Legion
- j. a university that receives regular and ongoing operating funds from the Government of Ontario for the purposes of post-secondary education
- k. the owner of an Indigenous Institute prescribed for the purposes of section 6 of the *Indigenous Institutes Act, 2017* as part of the development of post secondary facilities
- l. expansions to industrial buildings (gross floor area)
- m. 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 (11) 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.

Considerations:

If a board elects to not 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

¹ If only a portion of the building or structure is to be used for the any of the purposes listed below, only that portion of the building, structure, addition or alteration is exempt from an education development charge.

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).

Existing EDC By-law Provisions:

The HWDSB’s existing “in-force” EDC by-law applies to residential development only. The Board has the ability to revisit this policy decision as part of the April 2024 by-law adoption process.

C.2.5 Demolition and Conversion Credits through Redevelopment

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.”

Section 5 of O. Reg. 20/98 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 grace period for the replacement of non-residential GFA is five years.

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).”.

C.2.6 % 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 EDC section of the DCA legislation, a charge on non-residential development (then termed “commercial” development) was required. However, it is important to note, the legislative ‘cap’ rate increase is applied to existing by-law rates, which are premised on an earlier decision of the board respecting residential and non-residential shares.

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 (i.e., where possible under the legislative ‘cap’). However, a non-residential EDC is not a mandatory requirement of the structure in 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 limited available funding sources to make up the differential);
- 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.

C.2.7 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 each 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.

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.

C.2.8 Alternative Projects (A Lower Cost Alternative to Site Acquisition)

Section 257.53.1 of the *Education Act* provides an opportunity for a school board to seek Ministry approval to allocate EDC revenue towards an alternative project. An alternative project must have an associated cost that is less than the cost to acquire a site, and is expected to lower EDC rates.

Examples of alternative projects include:

- Alternative parking arrangements such as underground parking garages or offsite parking;
- Additional construction costs attributed to vertical construction;
- Purpose built space within a larger development;
- Alternative play area enhancements; and
- Pedestrian access improvements.

If, as part of solidifying the elements of the alternative project, a change to the alternative project is proposed, the board must notify the Minister and seek renewed approval within the timelines prescribed in section 8 of O. Reg. 20/98.

Typically, alternative projects would be considered as a cost-effective site acquisition solution where land costs are prohibitive due to the residential density proposed (i.e., intensified land uses).

The HWDSB expects to give consideration to potential Alternative Projects, with the expectation that this will reduce the cost of acquiring an ‘interest in land’ necessary to accommodate enrolment growth generated by new housing development.

C.2.9 Localized Education Development Agreements (LEDAs)

A Localized Education Development Agreement (LEDA) is a Minister-approved alternative to the traditional EDC revenue supported purchase of land for pupil accommodation. This provides more flexibility to EDC eligible school boards where a developer may provide sites.

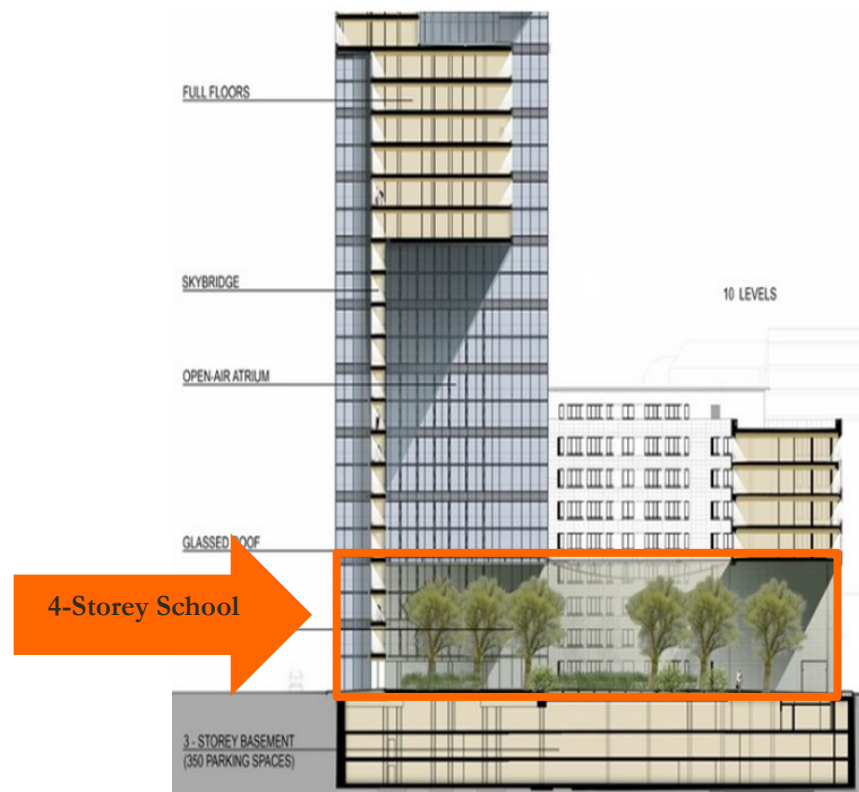
A LEDA is an agreement between a school board and an owner, such as a land developer, in which the owner provides a means for pupil accommodation or other benefit to be used to provide pupil accommodation. In exchange, the geographical area that the LEDA will service will be exempt from the collection of EDCs.

School boards are expected to consult with co-terminus boards when developing a LEDA to determine if a joint project is feasible.

Examples of Localized Education Development Agreements Examples of LEDAs include but are not limited to:

- Providing access to land (either through a long-term lease or gift);
- Owner constructs and provides facilities (e.g., podium builds). This could result in many different types of agreements including:
 - Owner provides podium space only in a condo building. The Ministry of Education provides funding through the Capital Priorities Grant program to support the construction of the school. Any cost over and above the benchmark would be provided by owner; and
 - Owner provides podium space and funds to construct a new school within a podium.

Example of a podium school:



C.3 Summary of By-law Appeals, Amendments and Complaints

C.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 Land Tribunal 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.”

The HWDSB by-law adopted in 2019 was appealed by Indwell Community Homes and subsequently withdrawn.

C.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.”

C.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.”