



TOWN OF
PENETANGUISHENE

COMMUNITY IMPROVEMENT PLAN

FINAL DRAFT | JUNE 2020

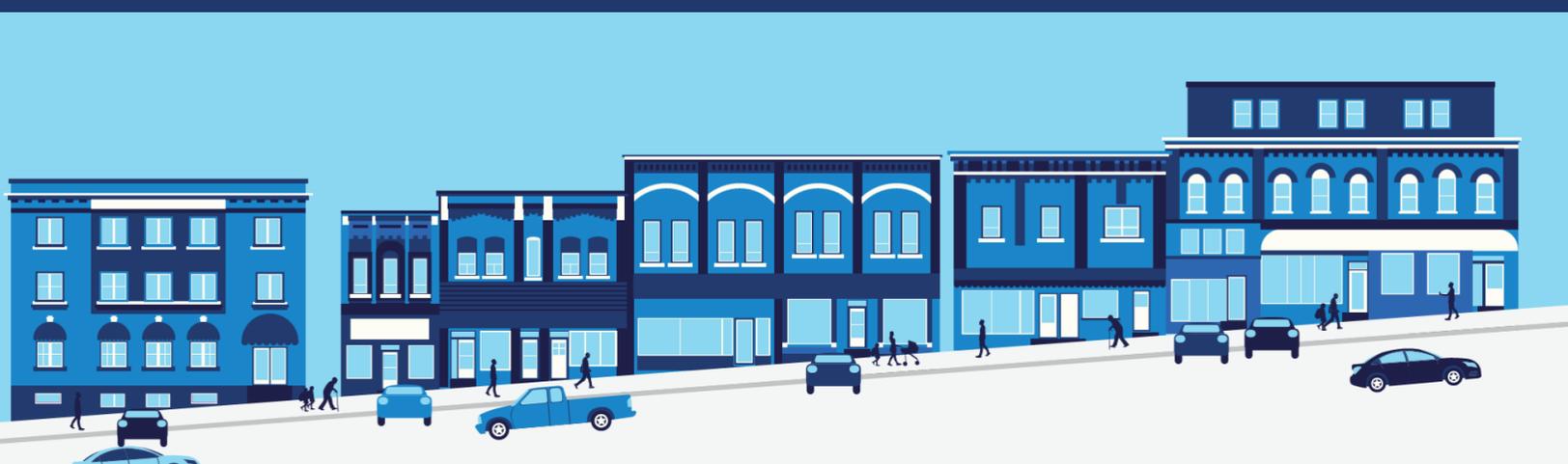


TABLE OF CONTENTS

1.0 INTRODUCTION.....	1
1.1 Purpose and Background	1
1.2 Study Context	1
1.3 Community Improvement Project Area and Precincts	2
1.4 Consultation.....	3
1.5 Overview of this Plan	3
1.6 How to Use this Plan	4
2.0 VISION, GOALS AND OBJECTIVES	6
2.1 Context	6
2.2 Vision	6
2.3 Goals and Objectives.....	6
3.0 FINANCIAL INCENTIVE PROGRAMS.....	9
3.1 Authority.....	9
3.2 General Program Applicability (Precincts)	9
3.3 Building Façade Improvement Program	10
3.4 Signage Improvement Program.....	12
3.5 Building Improvement and Renovation Program	14
3.6 Affordable Housing Program	16
3.7 Landscaping and Property Improvement Program	18
3.8 Tax Increment Program	20
3.9 Planning and Building Fee Rebate Program	23
4.0 GENERAL ELIGIBILITY AND ADMINISTRATION POLICIES.....	25
4.1 General Eligibility Requirements.....	25
4.2 Financial Incentive Program Budget.....	26
4.3 Administration and Approvals of Financial Incentive Programs.....	27
4.4 Application Intake.....	27
4.5 Application Process	27
5.0 IMPLEMENTATION	29
5.1 General	29
5.2 Community Improvement Project Area	29
5.3 Plan Monitoring and Evaluation Strategy	31

1.0 INTRODUCTION

The Town of Penetanguishene has developed a Community Improvement Plan (this “Plan”) as a tool to improve and revitalize Downtown Penetanguishene and other targeted commercial and mixed-use areas. This section introduces the purpose and background of the Plan, provides study context, and reviews the consultation conducted and project area. This section also establishes how the Plan is to be used. This section is not an operative part of the Plan.

1.1 PURPOSE AND BACKGROUND

The purpose of the Plan is to provide a long-term strategy that will facilitate the ongoing enhancement and revitalization of the Town. This Plan presents specific goals and objectives to guide revitalization in the Town in an appropriate and contextual manner through a series of financial incentive programs that will promote private property improvement in a manner that contributes to the identified vision.

A Community Improvement Plan (CIP) is a planning tool that is prepared under Section 28 of the Planning Act and is principally used to encourage private sector development and/or investment within a defined area – the Community Improvement Plan Project Area (the “Project Area”). Programs administered through a CIP include financial incentives for private property owners and tenants to achieve the goals and objectives of the

Plan. Each program administered through the Plan includes specific criteria to ensure appropriate administration and implementation to achieve the stated vision, objectives and goals.

1.2 STUDY CONTEXT

The Town of Penetanguishene is a waterfront community located on the southern shore of Georgian Bay, in an inlet referred to as Penetang Harbour. For this reason, it is commonly referred to as the “Gateway to Georgian Bay”. The Town was incorporated in 1882 but embraces over 400 years of modern history. The distinct identity of Penetanguishene is based on four founding cultures and reflects a close connection to the surrounding natural landscape.

The Town of Penetanguishene is part of North Simcoe County, which is comprised of the Town of Midland, Town of Tay, and Township of Tiny, as well as Penetanguishene itself. The Town is located within the upper-tier jurisdiction of Simcoe County. It is located 160 kilometres northwest of Toronto and has a population of approximately 9,600 residents at the time of writing this Plan.

The Town has a diverse economy that includes major employers associated with institutional, industrial, and educational uses. The economy is also largely driven by a strong tourism industry that is closely tied to Georgian Bay and the surrounding landscape. The Town is home to four marinas and experiences significant boat traffic during the tourism season.

Primary access to the Town is provided by County Road 93 and Highway 12, which extend west from Highway 400, being part of the TransCanada Highway system. County Road 93 ultimately becomes Main Street, functioning as the Town's primary commercial corridor and providing access to the Town's historic downtown area. Penetanguishene is both a local and regional centre, providing a range of commercial and business services to the surrounding area.

This Plan aims to provide locally considerate and contextual solutions to facilitate the revitalization and improvement of the Town of Penetanguishene while embracing and respecting over 400 years of modern history and the distinct identity of the Town. Through a Community Improvement Plan, the Town will be able to encourage property owners, through financial incentives, to further contribute to the growth of the local economy and the Town's historic downtown area along Main Street.

1.3 COMMUNITY IMPROVEMENT PROJECT AREA AND PRECINCTS

The Community Improvement Project Area refers to the lands in the Town of Penetanguishene that are subject to this Plan. The financial incentive programs offered by this Plan are only available within the defined Community Improvement Project Area. The Community Improvement Project Area is established via a by-law of Council and is

administered separately from this Plan in order to permit modifications without the need to amend this Plan. The reader should contact the Town to confirm the current Community Improvement Project Area.

Generally, this Plan intends to focus on the Downtown and periphery commercial and mixed-use areas of the Town. This Plan includes policies to guide the establishment and refinement of the Community Improvement Project Area. The areas of focus of this Plan include lands within two land use designations identified within the Town of Penetanguishene Official Plan. This includes the Downtown and Waterfront Area land use designation and the Mixed Use and Commercial land use designation.

This Plan also makes reference to the notion of "Precincts" wherein different financial incentive programs will be made available. The Precincts are defined in this Plan and are delineated separately in the by-law that delineates the Community Improvement Project Area. This will enable flexibility with respect to the boundaries as Council will be able to modify the precincts via a by-law, in accordance with the policies of this Plan.

For reference purposes, the Precincts are generally described as follows, but, as noted, are delineated separately in the Community Improvement Project Area:

- The **Central Precinct** consists of the historic core of Penetanguishene, centred around Main Street and consisting of some periphery commercial and mixed-use areas. A wide range of incentive programs will benefit this area, ranging from façade and building improvements to incentives related to appropriate infill and redevelopment. There is an emphasis on restoring and promoting conservation of historic resources in the Central Precinct.
- The **Northern Precinct** consists of lands north of the historic core including a mix of various building types and typologies and including some historic buildings. This area will similarly benefit from a range of incentive programs including the need to accommodate suitable mixed-use infill and redevelopment in a manner that implements the Official Plan. Like the Central Precinct, the Northern Precinct is designated Downtown and Waterfront Area.
- The **Southern Precinct** consists of lands generally in the vicinity of Main Street and located south of Poyntz Street. This area largely corresponds with the “Mixed Use and Commercial Area” land use designation of the Official Plan. These lands consist of principally which are envisioned by the Official Plan to intensify over time. This area will benefit from landscaping related improvements as well as

incentives to encourage the type of infill and redevelopment promoted by the Official Plan.

1.4 CONSULTATION

Effective and purposeful engagement is an essential part of developing a local and contextual Plan that is appropriate for the local community.

As part of the development of this Plan, an Open House and Walking Tour was held on November 25, 2019. The Open House provided an opportunity for local residents to learn about the process of developing a CIP and provide initial thoughts on how the CIP can help improve and revitalize the Town of Penetanguishene. The Walking Tour was a creative and engaging way for the project team, Town staff and local residents to become familiar with the proposed study area and understand the local history and context.

Participants were asked to provide comments and suggestions on what types of improvements are desired in the Town and what types of incentives would encourage private property owners to contribute to the revitalization of the Town. The input received from the Open House and Walking Tour was incorporated into the development of this Plan.

1.5 OVERVIEW OF THIS PLAN

This Plan is comprised of five main sections. Section 1 of this Plan is not an operative component of the Community

Improvement Plan, but is intended for the reader's convenience. The Sections are described below:

- **Section 1: Introduction** provides for an overview of the purpose, background and study context for this Plan. This section allows readers to understand the foundation of this Plan, and how it will be generally used to facilitate revitalization in the Town of Penetanguishene. This Section does not form an operative component of the Plan.
- **Section 2: Vision, Goals and Objectives** outlines the visions, goals and objectives that this Plan will work to achieve. This Section forms an operative component of the Plan under Section 28 of the Planning Act, as it establishes the overall purpose of the Plan. The vision, goals and objectives are also tied to eligibility of the financial incentive programs. Each project that is completed under this Plan will contribute to the achievement of the vision, goals and objectives stated in this section.
- **Section 3: Financial Incentive Programs** describes the financial incentives that can be made available as part of this Plan to encourage revitalization and improvements in the study area. This Section forms an operative component of this Plan as it describes the financial incentive tools as authorized under Section 28 of the Planning Act. This Plan proposes a

range of financial incentives, including grant and loan programs, which would need to be funded by Council. This Plan emphasizes flexibility and enables Council to fund or "activate" any of the programs based on funding availability or other priorities.

- **Section 4: General Administration and Eligibility Criteria** outlines the associated administration and eligibility criteria of the proposed financial incentives for implementation. This Section forms an operative component of this Plan.
- **Section 5: Implementation** includes policies to ensure appropriate execution of this Plan and that this Plan will be successful through ongoing monitoring and, if necessary, future updating.

1.6 HOW TO USE THIS PLAN

This Plan will be read and used by private landowners and tenants within the Project Area. The programs administered this Plan are intended to encourage and facilitate the ongoing revitalization and improvement of the Town of Penetanguishene through specific improvement projects.

This Plan contains details of the financial incentive programs and the vision, goals and objectives of the Plan. It is intended that the Town will assist interested persons in reading and understanding this Plan, and the interpretation of this Plan will be at the discretion of Council. The

Town may create promotional or marketing materials to help support this Plan's intent and communicate its success.

As much as possible, this Plan adopts a flexible approach, to give Town staff and Council a range of tools and the flexibility needed to adapt to changing revitalization needs and budget considerations. For example, the range of financial incentives administered through this Plan may be funded in any combination and in any given year subject to Council's discretion. The Community Improvement Project Area, which designates the area to which the Plan applies to, may also need to be modified as the community evolves. It is intended that this Plan will focus on the revitalization of the existing built-up community including vacant properties and not on undeveloped, greenfield areas at the edges of the Town.

Private landowners and tenants who would like to apply for financial incentives should review Sections 3 and 4, which detail the financial incentive programs, the eligibility criteria and administrative process. Readers should contact Town staff to discuss a proposed project and determine eligibility and funding availability. In addition, applicants should be familiar with Section 2, which establishes the vision, goals and objectives this Plan aims to achieve.

2.0 VISION, GOALS AND OBJECTIVES

2.1 CONTEXT

The intent of establishing a vision is to broadly describe what this Plan aims to achieve. The vision functions as a beacon for the future. The vision statements are high level principles and are supported by a range of goals and more focused and specific objectives. Stating these elements will help ensure that the intent of the Plan is realized.

This vision, goals and objectives also function to serve the monitoring and evaluation of this Plan over time. Where an objective or goal is not being realized, the Town may identify a need to revisit this section or the incentives associated with a specific objective or goal.

While the intent of this section is to advance the revitalization of Downtown Penetanguishene through this Plan, it should not be interpreted as giving effect to matters regarding land use, development, or planning policy.

2.2 VISION

The vision guides how the programs of this Plan will be administered to achieve the ongoing revitalization of the Community Improvement Project Area. The vision sets out a long-term picture of the future.

The vision for the Community Improvement Project Area, encompassing

Downtown Penetanguishene and periphery areas, is for this area to:

- Be the heart of the community and the economic hub;
- Promote and value the distinct identity, history, and heritage of Penetanguishene;
- Be a beautiful, interesting destination with a unified, historic aesthetic;
- Offer a diverse range of services and shops that meet the everyday needs of both residents and visitors;
- Intensify over time, forming a more vibrant, desirable place to live with a wider range of shops and types of housing opportunities including affordable housing options;
- Be a regional tourism destination that is safe and inviting for all, including unique shops and services and a vibrant street life; and,
- Build on municipal leadership for the continued revitalization of Downtown Penetanguishene.

2.3 GOALS AND OBJECTIVES

The vision includes several principles that are intended to guide the continued revitalization of Downtown Penetanguishene. To support the implementation of the vision principles, specific goals and objectives are established for Downtown Penetanguishene. They are:

Goal #1: Facilitate the long-term revitalization of the community as a vibrant, safe destination

1. Facilitate appropriate mixed-use development on suitable infill opportunity sites and appropriate redevelopment.
2. Reduce commercial vacancy rates through the provision of incentives, including Building Code incentives, that may represent a barrier to securing tenants.
3. Create sidewalk cafés and other semi-public streetscape elements that support a more vibrant streetscape and lifestyle.
4. Provide incentives to encourage additional housing opportunities in Downtown Penetanguishene to support local businesses.

Goal #2: Promote Downtown Penetanguishene’s distinct character and identity, conserve and enhance heritage, and foster a cohesive aesthetic

5. Rehabilitate and improve building exteriors, including façades and signage, through coordinated design criteria that are aligned with the existing building character of the Downtown.
6. Set out a high standard of design for façade and signage improvements, which emphasizes the need to restore

or highlight historic building materials and design, where applicable.

7. Ensure that development contributes to an enclosed, pedestrian-oriented streetscape that respects the character of the surrounding community.
8. Ensure that property improvements contribute to an overarching vision for a cohesive community aesthetic in Downtown Penetanguishene (colours, architectural features, building massing and character) while encouraging uniqueness and creativity.
9. Bring historic buildings into productive use to reduce their risk of deterioration through Building Code upgrades and other improvements which make them attractive spaces for future businesses and tenants.
10. Recognize historic buildings and elements through heritage signage and other innovative elements that connect historic buildings to their original ownership and use.

Goal #3: Create additional opportunities for a range of housing options, to generate a critical mass of local residents that support local businesses and contribute to a vibrant street life

11. Create opportunities for innovative housing forms, including infill and laneway housing, in appropriate areas.
12. Support the retention and creation of dedicated tenant off-street parking

opportunities for downtown housing through innovative programs and incentives.

13. Promote the appropriate intensification of the mixed-use areas of the Town to accommodate a range of uses and housing opportunities as envisioned by the Official Plan.
14. Rehabilitate and improve existing upper-storey residential units to ensure they meet a high quality of life standard and contribute to the range of housing options in the Town.

Goal #4: Create a safe, inviting and pedestrian-friendly community that is accessible for all

15. Remove and address physical barriers and enhance the accessibility of private property so that all residents can actively participate in their community.
16. Facilitate beautification of landscaping and parking areas in appropriate areas to create a softer, safer and more comfortable pedestrian realm.
17. Ensure that infill and redevelopment is pedestrian-oriented through the orientation and location of buildings and sidewalk-oriented entrances.
18. Create opportunities for bicycle parking in the public realm to enhance cycling tourism and promote active transportation.

3.0 FINANCIAL INCENTIVE PROGRAMS

The financial incentive programs represent the principal tool enabled by this Plan to help realize the stated vision for the Town of Penetanguishene. The incentives are intended to encourage private investment as a means to realize the vision, goals and objectives of Section 0. This Plan enables a wide range of incentive programs in order to contribute to the broad revitalization needs of the community.

Financial incentives provided for by this Plan shall only be made available where the stated eligibility requirements are satisfied. This Plan contains general eligibility requirements that are applicable to all programs (Section 4.1). Each program also contains program-specific eligibility criteria as included within this section.

3.1 AUTHORITY

The authority for administering this Plan is provided under Section 28(7) of the Planning Act. This Plan also conforms to Policy 3.3 of the Town's Official Plan, which directs Council to identify a Community Improvement Project Area and adopt a Community Improvement Plan.

3.2 GENERAL PROGRAM APPLICABILITY (PRECINCTS)

Incentive programs administered through this Plan are applicable to three precincts within the Community Improvement

Project Area: the Central Precinct, Northern Precinct and Southern Precinct. The Precincts are shown in the current Community Improvement Project Area, which is designated separately by a by-law of Council. Each precinct contains different revitalization needs, and as such, different programs are applicable to different precincts. The programs that will be available to each precinct are indicated in the Program description.

3.3 BUILDING FAÇADE IMPROVEMENT PROGRAM

3.3.1 Purpose and Intended Outcomes

The Building Façade Improvement Program is intended to encourage the rehabilitation, reparation, or improvement of building façade elements and promote high-quality and attractive enhancements. The program will result in the enhancement and viability of buildings in the program area and contribute to the protection of historic character where applicable.

The program will be administered in the format of a grant or a loan. In particular, the program will encourage the restoration of historic buildings and their historic attributes and building materials where applicable.

3.3.2 Eligible Properties, Uses, and Buildings

1. Only properties located in the Central Precinct and the Northern Precinct are eligible.
2. Eligible buildings shall include commercial buildings, institutional, or mixed-use buildings (such as ground floor commercial and upper-storey residential). Additionally, any properties that are designated under Part IV or V of the Ontario Heritage Act are eligible.
3. Eligible façades shall only include front façades and side or rear façades that are visible from a public street. The Town shall have discretion regarding

which façades are eligible based on funding availability, visibility or other considerations.

3.3.3 Eligible Costs

The potential grant or loan value shall be calculated based on the estimated value of the following eligible costs:

1. Repair, replacement or restoration of façade materials (such as masonry, brickwork, wood siding, plaster, metal shingles), architectural detailing or foundation improvements;
2. Repair, replacement or new installation of awnings or canopies;
3. Replacement or installation of exterior lighting;
4. Painting, cleaning or other similar treatments to improve façade materials or enhance long-term durability;
5. Window and door replacement provided that the improvements are part of a larger project (i.e., associated with other eligible costs listed above) and the work represents an improvement in detailing or aesthetics and is not simply a lifecycle replacement of glass or a door;
6. Accessibility or barrier-free access improvements generally to the building exterior, such as improvements to stairs/entrances or automatic doors, provided these activities are part of a larger improvement project (i.e., associated

with other eligible costs listed above);
and

7. The services of an architect, engineer or heritage professional to advise on the improvements listed above are retained provided the value does not exceed 15% of total eligible costs.

3.3.4 Grant or Loan Value

The program is available as a grant or a loan as follows:

1. The maximum value of a grant shall be 50% of eligible costs to a maximum of \$10,000. For corner lots, or lots with an eligible street-facing building frontage that exceeds 30 metres, or for any building that is designated under the Ontario Heritage Act, the maximum grant shall be 50% of eligible costs to a maximum of \$12,500.
2. The maximum value of a loan shall be 25% of eligible costs to a maximum of \$40,000. For corner lots, or lots with a building frontage that exceeds 30 metres, or for any building that is designated under the Ontario Heritage Act, the maximum loan shall be 25% of eligible costs to a maximum of \$50,000.

3.3.5 Payment of Grant or Loan

1. A grant shall be paid as a single payment upon completion of the improvements, to the satisfaction of the Town.
2. A loan shall be paid in accordance with the terms and conditions of an

executed agreement that is registered on title, in accordance with the policies of this Plan.

3.3.6 Eligibility Criteria

1. The policies of Section 4.1 – General Eligibility Criteria apply to this program.
2. To be eligible for this program, projects shall be in compliance with all applicable design requirements from the Town of Penetanguishene's Community Design Standards Manual.

3.4 SIGNAGE IMPROVEMENT PROGRAM

3.4.1 Purpose and Intended Outcomes

The purpose of the signage improvement program is to promote new or restored signage that contributes to the historic identity of the community and an overall coordinated aesthetic. Signage has an important role in creating a vibrant and engaging public realm that attracts customers to commercial businesses. New or restored signage is intended to be aesthetically-appealing, pedestrian-oriented, and attractive. The program is available as a grant or loan.

3.4.2 Eligible Properties, Uses, and Buildings

Only commercial uses located in the Central Precinct and Northern Precinct are eligible.

3.4.3 Eligible Costs

The potential grant or loan value shall be calculated based on the estimated value of the following eligible costs:

1. Replacement, repair, improvement or installation of signage attached to building façades including signage lighting. Eligible Signs will include:
 - Fascia signs, which are primary signs attached to buildings, specifically signs on a façade's sign board area or a sign above a building entrance or porch;
 - Projecting signs, which may be used as primary or secondary signs

which complement the main building signage; and

- Additionally, a stand-alone ground sign for a business and located in a front yard associated with a single detached dwelling that has been converted to a commercial use, provided that landscaping is provided;
2. Costs associated with the removal of any signage which does not comply with the design criteria of this Plan, provided there is a new sign installed in accordance with this Plan; and
 3. Costs for professional design/architectural services to design the sign, up to a maximum of 15% of the eligible costs.

3.4.4 Grant or Loan Value

The program is available as a grant or a loan as follows:

1. The maximum value of the grant shall be 50% of eligible costs to a maximum of \$2,500.
2. The maximum value of the loan shall be 25% of eligible costs to a maximum of \$10,000.

3.4.5 Payment of Grant or Loan

1. A grant shall be paid as a single payment upon completion of the improvements, to the satisfaction of the Town.
2. A loan shall be paid in accordance with the terms and conditions of an executed agreement that is registered

on title, in accordance with the policies of this Plan.

3.4.6 Eligibility Criteria

1. The policies of Section 4.1 – General Eligibility Criteria apply to this program.
2. Projects proposed under this program must be in compliance with the Town’s Sign By-law and receive a permit as may be required in accordance with the By-law.
3. To be eligible for this program, projects shall be in compliance of the following design requirements from the Town of Penetanguishene’s Community Design Standards Manual and other requirements as noted below:
 - Signage shall be proportional to the size of the façade and generally aimed at a pedestrian-oriented design, rather than being oriented to motor vehicles.
 - Signage shall be consistent with principles of accessible and age-friendly design.
 - Lettering should utilize fonts that are appropriately sized for the size of the sign.
 - Colours should be highly contrasting with dark lettering on light backgrounds or light lettering on dark backgrounds.
 - Backlit or neon signs are not eligible and are not permitted per the

Town’s Sign By-law. Front-lit signage is encouraged.

- Raised lettering is encouraged.
- If highly graphical or stylized signage is used in the primary sign, then there should be a secondary sign with plain, clear lettering.

3.5 BUILDING IMPROVEMENT AND RENOVATION PROGRAM

3.5.1 Purpose and Intended Outcomes

The Building Improvement and Renovation Program, administered in the form of a grant or loan, works to contribute to the restoration or renovation of existing buildings and uses. This program provides financial incentives for structural repairs, to address Ontario Building Code or Fire Code deficiencies, or for improved interior building accessibility. The intended outcome of this program is to ensure that the existing building stock is well-maintained and to assist in reducing barriers to securing tenants within commercial space.

3.5.2 Eligible Properties, Uses, and Buildings

Only properties located in the Central Precinct are eligible for this program. Further, only multi-storey buildings are eligible for this program.

3.5.3 Eligible Costs

The potential grant or loan value shall be calculated based on the estimated value of the following eligible costs:

1. Interior and exterior works that are related to bringing the building into compliance with the Ontario Building Code or Fire Code, including:
 - Fire protection systems and insulation;
 - Ventilation systems;
 - Electrical systems and wiring;
 - Plumbing and water systems;
 - Water damage repair or prevention including roof repair related to a damaged area; and
 - Foundation or structural improvements.
2. Interior renovations intended to bring the building into compliance or exceed minimum Building Code requirements related to accessibility, such as:
 - Stairway, elevator, railing or similar improvements;
 - Interior doorway improvements;
 - Improvements to create accessible washrooms; and
 - Signage.
3. The services of a professional engineer, architect or professional, to a maximum of 15% of the eligible costs described above.
4. For clarity, and without limiting the exclusionary nature of the foregoing eligible costs, the following works are not eligible:
 - Lifecycle replacements of any components of the building that are still in compliance with the Building Code or Fire Code;
 - Heating and cooling systems;
 - General replacement or repair of roof shingles;

- Decorative elements or finishing (painting, drywall, finished flooring); and
- Replacements, improvements or repairs to non-permanent elements of a building or business (e.g., furniture, appliances).

3.5.4 Grant or Loan Value

The program is available as a grant or a loan as follows:

1. The maximum value of a grant shall be 50% of eligible costs to a maximum of \$10,000. For any property that is designated under Part IV or Part V of the Ontario Heritage Act, or is listed on the heritage register, the maximum value of a grant shall be 50% of eligible costs to a maximum of \$15,000.
2. The maximum value of a loan shall be 25% of eligible costs to a maximum of \$40,000. For any property that is designated under Part IV or Part V of the Ontario Heritage Act, or is listed on the heritage register, the maximum value of a loan shall be 25% of eligible costs to a maximum of \$60,000.

3.5.5 Payment of Grant or Loan

1. A grant shall be paid as a single payment upon completion of the improvements, to the satisfaction of the Town.
2. A loan shall be paid in accordance with the terms and conditions of an executed agreement that is registered

on title, in accordance with the policies of this Plan.

3.5.6 Eligibility Criteria

The policies of Section 4.1 – General Eligibility Criteria apply to this program.

To be eligible for this program, projects shall be in compliance of the Town of Penetanguishene’s Community Design Standards Manual as may be applicable to any exterior programs. Further, any improvements shall be in compliance with the Ontario Building Code and Ontario Fire Code as applicable.

3.6 AFFORDABLE HOUSING PROGRAM

3.6.1 Purpose

The purpose of the Affordable Housing Program is to increase and improve the Town's inventory of affordable housing opportunities through private investment in mixed-use buildings. The program focuses on upper-storey and rear floor space and does not address redevelopment or development on a vacant lot, nor does it apply to apartment buildings or other buildings used solely for residential uses. The program is thus also intended to promote the continued use and viability of mixed-use buildings and contribute to the growth of the Downtown as a vibrant area.

The program addresses two types of improvements:

1. To encourage the creation of new housing units through the conversion of existing non-residential upper-storey or rear floor space to new housing units; and
2. To encourage the renovation and improvement of existing upper-storey dwelling unit(s) or rear dwelling unit(s) in mixed-use buildings to improve the quality of the spaces including its Building Code/Fire Code compliance, its accessible design and the quality of finishes.

3.6.2 Eligible Properties, Uses, and Buildings

Only properties within the Central Precinct and the Northern Precinct are eligible.

Only multi-storey, mixed-use buildings are eligible for this program where there is a ground floor commercial or institutional space. The program shall apply to any apartment units located in the upper-storey or the rear of the building. For clarity, apartment buildings, single detached houses or other sole residential buildings are not eligible.

3.6.3 Eligible Costs

The potential value of a grant or loan shall be based on the estimated value of any eligible costs, which may include one of the following categories per property:

1. **Conversion of non-residential space to new residential unit(s):** Costs associated with the conversion of an existing upper-storey or rear unit in a multi-storey commercial or mixed-use building from a non-residential space to a space that is configured for residential unit(s), including required interior renovations to meet the requirements of the Building Code and Fire Code, such as structural, electrical, safe egress, ventilation, fire protection including associated insulation, and similar improvements. This shall not include costs associated with finishing materials or decorative elements, such as flooring, drywall/painting, light

fixtures, appliances, bathroom/kitchen fixtures, countertops or similar elements.

2. **Improvement of existing residential units:**

Costs associated with the improvement or renovation of an existing upper-storey or rear dwelling unit in a mixed-use building, including:

- Works related to Ontario Building Code or Fire Code compliance, such as structural, electrical, safe egress, ventilation, fire protection including associated insulation, and similar improvements;
- Accessibility improvements including accessibility improvements to the building lobby or vestibule providing access to the residential units; accessible washroom, interior doorway or kitchen facilities;
- Permanent finishing materials and permanent decorative elements, including painting, drywall, trim, permanent light fixtures, flooring, countertops and cabinetry, shall be an eligible cost to a maximum of 25% of the total eligible costs; and
- Costs for the services of a professional engineer or architect as may be required in association with the improvements noted above, to a maximum of 15% of the total eligible costs.

3.6.4 Grant or Loan Value

The program is available as a grant or a loan as follows:

1. The maximum value of a grant shall be 50% of eligible costs to a maximum of \$10,000 per residential unit. A maximum of three residential units per property shall be eligible.
2. The maximum value of a loan shall be 25% of eligible costs to a maximum of \$40,000 per residential unit. A maximum of six residential units per property shall be eligible.

3.6.5 Payment of Grant or Loan

1. A grant shall be paid as a single payment upon completion of the improvements, to the satisfaction of the Town.
2. A loan shall be paid in accordance with the terms and conditions of an executed agreement that is registered on title, in accordance with the policies of this Plan.

3.6.6 Program Eligibility Criteria

1. The General Eligibility requirements of Section 4.1 shall apply.
2. At its discretion, the Town may limit eligibility to projects that result in the creation of “affordable” housing units, or projects that are related to the improvement of affordable housing units. To this end, the Town may require that an agreement be registered on title relating to the rent or price of the housing unit. This Plan

does not define affordability and it is subject to determination by the Town on a case-by-case basis in consideration of Town and County definitions of affordability.

3.7 LANDSCAPING AND PROPERTY IMPROVEMENT PROGRAM

3.7.1 Purpose and Intended Outcomes

The purpose of the Landscaping and Property Improvement Program is to enhance the public realm through improvements to landscaping, parking areas, bicycle parking, laneways and other private property elements that can contribute positively to the public realm and address other objectives of this Plan. The program encourages more efficient use of off-street parking spaces. The program promotes enhancements to the pedestrian and public realm through the creation of outdoor seating areas and rooftop patios.

3.7.2 Eligible Properties, Uses, and Buildings

All commercial, institutional and mixed-use properties in the Central Precinct, Northern Precinct and Southern Precinct are eligible.

3.7.3 Eligible Costs

The potential grant or loan value shall be calculated based on the estimated value of the following eligible costs:

1. Landscaping improvements associated with any front yard parking area in order to buffer the sidewalk from the parking area. This shall include:
 - Professional landscaping with a preference to the provision of xeriscaping (i.e., native plantings);
 - Tree planting;

- Permanent planters, walkways, benches and other permanent features that enhance the sidewalk; and
 - Provision of fencing or other decorative vertical elements.
2. Installation of permanent bicycle parking.
 3. Installation or improvements to permanent outdoor seating areas and sidewalk café space. This includes elements such as fencing, paving and permanent landscape elements, provided the seating area is located at the edge of the sidewalk (or in a front or side yard). Non-permanent improvements shall not be eligible, including seating furniture.
 4. Improvements to parking areas within the Northern Precinct and Central Precinct only, including:
 - Paving with an improved material, such as permeable paving (must represent an improvement over existing conditions and not merely a life-cycle replacement);
 - Repainting to improve the efficiency or number of spaces in the parking area;
 - Works related to the provision of [Accessibility for Ontarians with Disabilities Act](#) (AODA) compliant accessible parking spaces and associated painting and signage;
 5. Provision of landscape buffers and islands (having regard for sight lines); and
 - Improved walkways or connectivity between parking areas and the public sidewalk or building entrance as well as curbing and lighting.
 5. Works associated with the provision of a rooftop patio in conjunction with a commercial use (restaurant) which will be intended for public use, including general structural works related to access and rooftop load reinforcement to meet the Building Code/Fire Code Requirements; safe and emergency egress elements; installation of barriers/fencing; electrical, plumbing or other permanent works to support the function of the use. For clarity, non-permanent elements and fixtures will not be eligible.
 6. Installation or improvements to pedestrian walkways and connections from the public street to the building entrance.
 7. Costs for the services of a professional engineer, planner or landscape architect as may be required in association with the improvements noted above, to a maximum of 15% of the total eligible costs.

3.7.4 Grant or Loan Value

The program is available as a grant or a loan as follows:

1. The maximum value of a grant shall be 50% of eligible costs and shall not

exceed a maximum of \$15,000, or \$500 per linear metre of lot frontage, whichever is less.

2. The maximum value of a loan shall be 25% of eligible costs and shall not exceed a maximum of \$45,000, or \$1,500 per linear metre of lot frontage, whichever is less.

3.7.5 Payment of Grant or Loan

1. A grant shall be paid as a single payment upon completion of the improvements, to the satisfaction of the Town.
2. A loan shall be paid in accordance with the terms and conditions of an executed agreement that is registered on title, in accordance with the policies of this Plan.

3.7.6 Eligibility Criteria

1. The policies of Section 4.1 – General Eligibility Criteria apply to this program.
2. To be considered eligible for this grant, the Town may require that the subject lands or areas be publicly accessible and this requirement may form a component of the agreement and may be registered on title.
3. To be eligible for this program, projects shall be in compliance with any applicable guidelines under the Town of Penetanguishene’s Community Design Standards Manual.

3.8 TAX INCREMENT PROGRAM

3.8.1 Purpose and Intended Outcomes

The tax increment program is intended to provide incentives for rehabilitation, redevelopment, or appropriate infill and intensification by providing a grant or loan related to the municipal property tax increase as a result of development. Heightened taxes are often experienced as an outcome of development that results in an increase to the assessed value of a property. For this reason, increased taxes may represent a barrier to development or improvement.

The potential incentives under this program are significant and are intended to promote major property improvements. As the value of the grant or loan is calculated based on the tax increment, only major projects can be eligible. The outcome of this program is intended to support the broader development, intensification and land use objectives of the Official Plan by promoting appropriate, desirable development.

3.8.2 Eligible Properties, Uses, and Buildings

All commercial, institutional and mixed-use properties in the Central Precinct, Northern Precinct and Southern Precinct are eligible.

3.8.3 Eligible Costs

The potential grant or loan value shall be initially calculated based on the value of the following eligible costs to ensure that

the value of the grant is related to the actual cost of the work being completed. In accordance with Section 28(7) of the Planning Act, an incentive program cannot provide grants or loans that exceed eligible costs. Eligible costs include construction and development related costs. The taxes themselves are not “eligible costs” but represent a basis for calculating the grant or loan. In addition, the value of the grant or loan shall be limited to the amount of the tax increment as described later in this section.

Following are the eligible costs that may be included in the calculation of a grant or loan:

1. Development of a vacant property for commercial, office, mixed-uses, institutional uses or multi-residential uses (at least four units);
2. Redevelopment of a property for commercial, office, mixed-uses, institutional uses or multi-residential uses (at least four units);
3. Major additions to a commercial or mixed-use property, involving an increase of at least 25% of the existing gross floor area of the building;
4. Infrastructure work including the improvement or reconstruction of existing on-site public or private infrastructure to support building expansions or the establishment of new uses;

5. Costs related to environmental site assessments and required environmental remediation; and
6. Professional services by an engineer, architect, and/or planner to a maximum of 15% of the foregoing eligible costs.

3.8.4 Grant or Loan Value

The program is available as a grant or a loan as follows:

1. The maximum grant value shall not exceed 25% of eligible costs. Further, the maximum grant value shall not exceed five times the amount of the initial tax increment. The tax increment is the increase in municipal property taxes resulting from the development after the taxes are reassessed following completion of the project.
2. The maximum loan value shall not exceed 25% of eligible costs. Further, the maximum loan value shall not exceed ten times the amount of the tax increment resulting from development. For the purposes of the loan program, the tax increment is the expected increase in municipal property taxes resulting from the development. The terms of an agreement shall establish guidelines respecting the calculation of the loan and expected tax increment.

3.8.5 Payment of Grant or Loan

1. The tax increment grant shall generally be paid as an annual “rebate” on property taxes paid. The first grant

shall be paid upon payment of the property taxes after the taxes are reassessed. The “rebate” shall be equal to or less than the tax increment calculated after the taxes are reassessed. The specific grant payment schedule and amounts shall be set out in the agreement that is registered on title.

2. A tax increment loan shall be calculated and paid in accordance with the terms of an agreement that is registered on title.

3.8.6 Eligibility Criteria

1. The policies of Section 4.1 – General Eligibility Criteria apply to this program.
2. This program accommodates various forms of development which are subject to permissions under the Official Plan, Zoning By-law, and other requirements. This program is not intended to indicate that uses or structures not permitted under policy or zoning are permitted.
3. To be eligible, the proposed development or redevelopment project must result in a substantial municipal property tax increase. The submission of a business plan and an estimate of the potential amount of the tax increment, based on current assessment values and the anticipated value of the investment, may be required by the Town. Any such supporting information may or may

not represent eligible costs to be used in the calculation of a grant or loan, at the Town’s discretion.

4. This program shall not be combined with any other grant program outlined in this Plan.
5. If an eligible applicant is approved for the program and if the subject property is sold, in whole or in part, before the original grant period lapses, the original owner may not be entitled to receive the remaining grant payments, in accordance with the terms of the program agreement. The payments are also non-transferable to the new owner unless specifically stipulated as part of the Financial Incentives Program Agreement executed between the owner at the time the agreement was entered into with the Town of Penetanguishene.
6. The loan program is generally intended to be paid up front prior to completion of construction and as such would be based on an expected tax increment. The loan program agreement shall establish requirements and expectations in the event the actual tax increment differs from the expected tax increment that was calculated at the time of loan issuance in order to protect the Town’s financial interests and security, including the potential requirement that a shortfall be paid to the Town within a set time period.

7. To be eligible for this program, projects shall be in compliance of the Town of Penetanguishene’s Community Design Standards Manual.

3.9 PLANNING AND BUILDING FEE REBATE PROGRAM

3.9.1 Purpose and Intended Outcomes

A planning and building fee rebate program is intended to reduce the cost of development and augment other incentive programs administered through a CIP.

The program may provide a grant or loan that reimburses all or a percentage of planning or building fees incurred by the landowner through the development approval process.

3.9.2 Eligible Properties, Uses, and Buildings

All properties in the Central Precinct, Northern Precinct and Southern Precinct are eligible.

3.9.3 Eligible Costs

The potential grant or loan used to offset the cost of fees and development charges shall be calculated on the basis of the following eligible costs. For clarity, the municipal fees or development charges themselves are not eligible costs, but are used to calculate the amount of the actual grant or loan under Section 3.9.4.

1. Development of a vacant property for commercial, office, mixed-uses, institutional uses or multi-residential uses (at least four units);
2. Redevelopment of a property for commercial, office, mixed-uses, institutional uses or multi-residential uses (at least four units);

3. Major additions to a commercial or mixed-use property, involving an increase of at least 25% of the existing gross floor area of the building;
4. Infrastructure work including the improvement or reconstruction of existing on-site public or private infrastructure to support building expansions or the establishment of new uses;
5. Costs related to environmental site assessments and required environmental remediation; and
6. Professional services by an engineer, architect, and/or planner to a maximum of 15% of the foregoing eligible costs.

3.9.4 Grant or Loan Value

The program is available as a grant or a loan as follows:

1. The maximum grant value shall be 100% of the fees associated with a required site plan application, building permit application, minor variance application, zoning by-law amendment application or development charges, or any combination thereof, or \$2,500, whichever is less.
2. The maximum loan value shall be 100% of the fees associated with a required site plan application, building permit application, minor variance application, zoning by-law amendment application or development charges, or \$10,000, whichever is less.

3.9.5 Payment of Grant or Loan

1. The grant shall be paid upon completion of the works to the satisfaction of the Town. For clarity, the applicant shall be responsible for payment of any required fees or charges initially and the grant is paid upon completion of the project.
2. A tax increment loan shall be paid in accordance with the terms of an agreement that is registered on title.

3.9.6 Eligibility Criteria

1. The policies of Section 4.1 – General Eligibility Criteria apply to this program.
2. For the purposes of clarity, this program is not funded via a rebate on paid fees or charges but is funded from the financial incentive program budget established by Council to implement this Plan.
3. The proposed development shall be in accordance with the Official Plan. An application to amend the Official Plan shall not represent an eligible application type to be used in the calculation of a grant or loan. Further, the Town may not accept any application that is not in conformity with the Official Plan.
4. To be eligible for this program, projects shall be in compliance of the Town of Penetanguishene’s Community Design Standards Manual.

4.0 GENERAL ELIGIBILITY AND ADMINISTRATION POLICIES

4.1 GENERAL ELIGIBILITY REQUIREMENTS

All applications for financial incentives will be subject to the general eligibility criteria listed in this section. Please note that there may be additional program-specific criteria outlined under each grant program in Section 3.

1. Applicants may be able to apply for more than one program. All programs may be combined except for the Tax Increment Program, which is not permitted to be combined with any other program.
2. The subject property shall not have outstanding tax arrears.
3. In accordance with the application process (Section 4.4) construction may only begin after application approval and the execution of the financial incentive program agreement. A completed project or a project that is under construction before application approval shall not be considered for a grant or loan.
4. The subject property must be within the Community Improvement Project Area and it must be within the applicable Precinct that is eligible for the program as identified in Section 3.
5. If the applicant is a tenant, the authorization and consent of the property owner shall be required as part of the application.
6. Where the Ontario Heritage Act applies to a subject property, any proposed improvements shall be consistent with the reasons for designation as set out in the by-law designating the property.
7. All proposed projects must represent an improvement to the property or building, and not represent a simple life cycle replacement of existing materials, paving, or structures to the satisfaction of the Town.
8. At the discretion of the Town, an application where the total calculated grant would be less than \$500.00 may be declined. Similarly, an application involving a loan less than \$2,500 may be declined at the Town's discretion.
9. The application and associated development shall conform to and meet the requirements of the Official Plan, Zoning By-law and any agency approvals as they may be required subject to the other eligibility criteria. At its sole discretion, the Town may accept applications that do not have full planning approvals, but the agreement may require all other approvals prior to releasing the grant or loan.
10. All applications shall contribute to achieving the overall vision, goals and objectives stated in Section 2 of this Plan. The Town may choose to refuse an application, refuse any eligible costs

or limit the grant or loan value on the basis that the application does not suitably contribute to the Plan's the vision, goals and objectives, at its sole discretion.

11. It is recognized that other approvals may be required in relation to a community improvement project. Applicants may apply for financial incentives prior to receiving other required approvals (e.g., rezoning or site plan approval). However, applicants need to be aware of the risk that not receiving other approvals may mean that a grant may not be paid or a loan may not be made available. Where approvals are required, the receipt of required approvals may be added by the Administrator as a condition for grant payment or loan availability in the financial incentive program agreement and/or the Town may not issue final approval of an application prior to other approvals being obtained.
12. This Plan does not exempt any applicant from receiving any other required approvals or complying with any applicable law.
13. This Plan shall not be construed to indicate land use or development permissions.
14. The maximum grant and loan values identified in this Plan are set as an absolute maximum and the Town has absolute discretion to limit the grant or

loan to a value that is less than the maximum, on the basis of funding availability, project design merit, priority or any other considerations.

15. The financial incentive program agreement may incorporate provisions regarding withdrawal of an application at the request of the applicant.
16. Applicants shall disclose all other funding and incentives being received for the project as part of the application for financial incentives in this Plan, including commercial or other loans. At the discretion of the Town, other grants or incentives may be deducted from the eligible grant or loan amount.
17. In no case will the value of all grants or loans exceed total eligible costs.

4.2 FINANCIAL INCENTIVE PROGRAM BUDGET

1. The Town shall be responsible for funding the financial incentive programs under this Plan.
2. The budget for the financial incentive programs shall be established and approved by Council.
3. Should any portion of an annual budget allocated to this Plan be unused, it may be carried over and applied in the following year.
4. At Council's discretion, portions of the annual budget of this Plan may be allocated to specific incentive programs. Conversely, Council may

choose to allocate no funding to certain programs.

4.3 ADMINISTRATION AND APPROVALS OF FINANCIAL INCENTIVE PROGRAMS

1. The Town will designate an Administrator to facilitate implementation of this Plan, liaise with applicants and potential applicants, liaise with Council, and generally process applications.
2. Council will be the default approval authority for making decisions on financial incentive applications. Council may choose to designate a Review Committee consisting of Town staff, external volunteers with applicable expertise or other members to make decisions on Council's behalf.

4.4 APPLICATION INTAKE

1. The application process will initially be a continuous, year-round process whereby the Town will accept applications at any time during a calendar year. The Town will review the applications in accordance with the process outlined in Section 4.4. When there is funding available for financial incentives, it will be allocated on a "first-come, first-served basis."
2. The Town may opt to implement an application intake window process. Under this process, the Town will only accept applications during one or more specified timeframe(s) throughout the year, with a clear deadline for

accepting applications. The Town shall review all applications simultaneously. Should there be more approved applications than there is funding available, the prioritization will be at the sole discretion of Town based on the following guidelines, implemented at the Town's sole discretion:

- Applications related to designated heritage buildings under the Ontario Heritage Act may be considered the first priority.
- Applications associated with properties in the Central Precinct may be considered the second priority.
- Applications related to corner lot properties may be considered as the third priority.
- Applications related to affordable housing and residential development may be considered the fourth priority.
- The order in which the applications were received during the intake window period may be considered as a fifth priority.

4.5 APPLICATION PROCESS

1. The applicants shall generally be required to meet with the Administrator to discuss the potential project before an application will be accepted. The Administrator will confirm application requirements, eligibility, process and timing and will recommend design considerations or

make other suggestions regarding the project to ensure it is in conformity with this Plan.

2. An applicant shall submit a completed application form along with any materials required by the Administrator in consultation with Town staff. Supporting materials that may be required will depend on the type of project and the grant being applied for. Further, supporting information may need to be prepared by qualified individuals or professionals at the Town's discretion. For example, supporting materials may include:

- Drawings, elevations, plans, and/or sketches of the proposed improvements;
- Current photos of the property;
- A minimum of two quotes to complete the work, except where the work is highly specialized in nature, or is of low value (i.e., under \$500), or there is another acceptable reason for not having at least two quotes at the discretion of the Town;
- Detailed information about any commercial loans or other funding or incentives being received for the project through other sources;
- Documents that confirm that the project complies with the Zoning By-law, Official Plan and/or any

other Provincial or Federal requirements as may be applicable;

- Historical information or photos of the property, as may be available; and
 - A project feasibility plan/pro forma and tax increment estimates as may be required in relation to the tax increment program.
3. The Town will review the application, with consultation from various Town staff, for completeness and eligibility, and inform the applicant that the application is considered "complete". If the application is considered "incomplete" the Town will inform the applicant of the reasons.
4. Once the application is deemed complete, the Town will circulate the application to the Review Committee for review.
5. The Town will conduct a meeting to make a decision on the application. If the application is refused, it will be returned to the applicant along with reasons for refusal. The applicant will have an opportunity to resubmit their application upon addressing the reasons for refusal. Where the decision for refusal is not made by Council, the applicant will have an opportunity to appeal the initial decision to Council for reconsideration. A decision by Council on the application shall represent the final decision.

6. If the application is approved, the Town will prepare and execute a financial incentive program agreement which requires signatures from the Town and the applicant including the property owner if the applicant is a tenant. The financial incentive program agreement will outline the terms and payment of the grant or loan. The agreement is also a tool that is used to ensure that the applicant is completing the project in accordance with their approved application.
7. An agreement may or may not be registered on title to enforce its implementation. An agreement respecting any loan or the tax increment grant shall always be registered on title.
8. Once the agreement is fully executed, the applicant may then begin construction (or as stated in the agreement) and inform the Administrator once the project is complete.
9. Inspections by the Town may be required to ensure compliance with the financial incentive program agreement. The Administrator may also request photos. If the completed project does not comply with the agreement, the Town, at its sole discretion, may not provide the payment in accordance with the agreement's terms.

10. If the Administrator is satisfied that the project has been completed in accordance with the financial incentive program achievement, payment of the grant will be made in accordance with the terms and/or schedule outlined in the agreement.

5.0 IMPLEMENTATION

5.1 GENERAL

1. It is intended that this Plan shall be administered over a 10-year time period. However, nothing shall prevent the Town from implementing this Plan for a different time period, as may be deemed appropriate or required by the Town.
2. If Council deems that the vision, goals, and objectives of this Plan have been realized, or the Community Improvement Plan is otherwise implemented or carried out, Council may dissolve the Community Improvement Project Area by a By-law, rendering this Plan inoperative.
3. Nothing in this Plan shall mean that applicants shall be removed of any obligation to comply with all other Town policies, by-laws, or regulations by the County, the Province, the Government of Canada, or any other agency.

5.2 COMMUNITY IMPROVEMENT PROJECT AREA

1. The Community Improvement Project Area determines the area to which this

Plan applies. A property located outside of the Community Improvement Project Area shall not be eligible for the financial incentives administered through this Plan.

2. The Community Improvement Project Area is established through a separate Town By-law and may be amended from time to time, at Council's discretion. Therefore, it is incumbent on an applicant to consult with the Town and confirm if their property is eligible for the incentives administered through this Plan.
3. Should Council deem that the Community Improvement Project Area boundaries should be amended, Council would do so by passing a new Community Improvement Project Area By-law, effectively replacing the current Community Improvement Project Area By-law.
4. This Plan makes reference to Precinct Areas which establish a limitation on eligibility for various financial incentive programs. The Precinct Areas are also shown in the Community Improvement Project Area by-law and are subject to change at Council's discretion.
5. It is noted that this Plan applies to the revitalization and rehabilitation of Downtown Penetanguishene and surrounding areas. It is recognized that the boundaries of Downtown Penetanguishene and its surrounding

areas may evolve and change over time. This may require the boundaries of the Community Improvement Project Area to be redefined on this basis. Modifications to the Community Improvement Project Area might be required as an outcome of the following circumstances:

- Council deems that the Community Improvement Project Area should be contracted to focus implementation resources on a more concentrated area;
- Council deems that the existing land use, built form, economic development or other conditions have evolved over time and there is a need to redraw the Community Improvement Project Area or the Precinct boundaries to align with current conditions; or
- Council deems that the Community Improvement Project Area should be expanded to encourage greater uptake and application of the incentives administered through this Plan. This may include where new planning policy is adopted and applies to areas abutting or adjacent to Downtown Penetanguishene. In these circumstances, the incentive programs administered through this Plan shall be reviewed or revised to determine appropriateness and applicability to the specific needs of the expanded

area(s). As a result, an amendment to this Plan may be required.

5.3 PLAN MONITORING AND EVALUATION STRATEGY

In order for this Plan to be successful and effective, a comprehensive monitoring and evaluation strategy is required. This will ensure that the programs are being utilized and that they are achieving their intended outcomes. The Administrator will conduct an annual monitoring and review process as outlined below:

1. Upon implementation of this Plan, the Town shall establish a database for monitoring and reviewing applications. For each application the Town should collect:
 - The type of project and the type of grant being sought;
 - Value of the grant being sought; and the total value of construction;
 - Address, property, applicant and ownership information;
 - The names of contractor(s) and supplier(s) which may be referenced by future applicants;
 - The type and quantity of improvements being made, as specific to the application (e.g., length of façade, number of parking spaces created/improved, number of signs, area of landscaping, etc.);
 - Number of new residential units created, or amount of non-residential floor area affected;
2. The Administrator will input the application information into the database upon receipt of each application. The Administrator is strongly encouraged to collect photos before the improvements, and after the improvements for recording and monitoring purposes.
3. The Administrator will report to Council on the opportunities and challenges of the Plan on an approximately annual basis, including:
 - The total value of grants issues and the total private investment made;
 - The amount of private investment leveraged by the Plan;
 - The total number of applications received and the total number of successful applications (total and per program);
 - Before and after photos of successful applications;
 - Any unintended outcomes of the programs, and measures for preventing unintended outcomes in the future;
 - Any recommended adjustments to the Community Improvement Plan or the Community Improvement Project Area or the Precincts as required;

- Any recommended improvements to Plan administration or application processing; and
 - Recommendations for funding programs, including whether additional funding might be required and which programs should be funded.
4. There may be a need to refine or revise the Plan or the Community Improvement Project Area or to revisit administrative procedures as an outcome of the review process. The following is a list of some of the types of changes that may represent an outcome of the Monitoring and Evaluation process:
- Delete or add eligible costs to a financial incentive program (note this requires an Amendment to this Plan);
 - Modify, delete or add to the “eligible properties” or any other eligibility criteria within each incentive program, the General Eligibility Requirements (Section 4.1) or other criteria (note this requires an Amendment to this Plan);
 - Delete or add a financial incentive program (note this requires an Amendment to this Plan);
 - Modify, delete or add to the vision, goals or objectives (note this requires an Amendment to this Plan);
 - Modify the Community Improvement Project Area;
 - Discontinue funding to any program(s) in a given year;
 - Allocate funding to certain programs in any given year; and
 - Delegate Council’s default authority for approving financial incentive programs to a committee or an individual, change the application intake process, or otherwise change procedures regarding the administration of this Plan.