

# **INFORMATION ITEMS**

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**Week Ending November 24, 2017**

## **REPORTS**

1. Commercial Policy Review: Stage 1 Commercial Analysis and Background Report

## **INTERGOVERNMENTAL CONSULTATIONS**

1. Policy Proposal Notice: Food and Organic Waste Framework

## **CORRESPONDENCE**

1. City of Guelph Correspondence re: City's Position Related to Bill 160, Ambulance Act

## **BOARDS & COMMITTEES**

1. None

## **ITEMS AVAILABLE IN THE CLERK'S OFFICE**

1. None

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Service Area	Infrastructure, Development and Enterprise Services
Date	Friday, November 24, 2017
Subject	<b>Commercial Policy Review: Stage 1 Commercial Analysis and Background Report</b>
Report Number	IDE-2017-130

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## Executive Summary

### Purpose of Report

To release the Commercial Policy Review: Stage 1 Commercial Analysis and Background Report for information. This report provides information about the current policy context, retail trends, key stakeholder input, consumer research, commercial supply and needs analysis contained in the attached consultant's report.

### Key Findings

The complete inventory of retail, service and vacant space conducted showed:

- the City currently offers approximately 785,100 square metres (8,451,000 million square feet) of commercial space, an increase from 664,500 square metres (7,153,000 square feet) in 2012 and 584,100 square metres (6,286,700 square feet) in 2008 ; and
- the current and potential supply of commercial space and land is sufficient to accommodate the demand for new commercial space to 2031 on a macro level.

It is forecast that there will be unmet demand of approximately 36,000 square metres (387,850 square feet) of commercial space by 2041.

Customer location research at five retail nodes, involving the recording of 2,250 licence plates, illustrates that the selected retail nodes have a strong customer draw from beyond the City's boundaries with an average of 42.7 per cent of collected licence plates originating from outside of Guelph.

Customer research of 400 randomly selected households showed that the City's retail space is comprehensive and reflects Guelph as an attractive shopping destination based on the high percentage of retail dollars spent in Guelph. At least 80 per cent of Guelph residents' retail dollars are spent at stores in Guelph, excluding the Furniture, Home Furnishing and Electronics category.

Key stakeholders interviewed shared the following views on commercial development trends and policies: mixed-use development, outside of the Downtown, is a challenge; opportunities exist in the east end of the City; and

opportunities exist for commercial development that are not directly impacted by e-commerce such as restaurants, and health and wellness.

## **Financial Implications**

The Commercial Policy Review is funded through approved capital funding.

## **Report**

### **Background**

The City is undertaking a review of the commercial policies in the Official Plan to provide an updated commercial policy framework for the City that will meet the projected growth needs for 2031 and provide the basis to meet the needs for 2041. The last commercial policy review update was undertaken in 2006. This review will ensure the policies reflect changes in the commercial market that have occurred since 2006.

In November 2016 Council approved a Terms of Reference for the Commercial Policy Review ([IDE Report 16-84 Commercial Policy Review: Terms of Reference](#)).

The Terms of Reference outlined the following three stage process:

- Stage 1 – Commercial Market Analysis and Background Report
- Stage 2 – Commercial Policy Framework Alternatives, Recommended Commercial Policy Framework, Policies and Regulations
- Stage 3 – Official Plan and Zoning By-law Amendments

A consultant team lead by Macaulay Shiomi Howson Ltd., in association with Tate Economic Research and Brook McIlroy Inc., was hired to undertake the first two stages of the review. City staff will complete Stage 3.

### **Stage 1 Report Highlights**

The Stage 1 Report provides information about the current policy context, retail trends, key stakeholder input, consumer research, commercial supply and needs analysis contained in the attached consultant's report (See Attachment 1).

### **Policy Context and Retail Trends**

The current policy context was reviewed along with retail trends that were based on Canadian shopping trends, key stakeholder interviews, a licence plate survey and in-home consumer telephone survey. Provincial policies and the tightening of land supply overall is resulting in a significant change in commercial built form. Mixed use, multi storey and pedestrian oriented development is the thrust of both Provincial and City land use planning policy, however the market makes these forms of development challenging in the Guelph context. In addition the retail sector is dynamic and constantly changing in response to the marketplace.

Retail trend highlights are:

- In Canada e-commerce accounted for 2 per cent of all retail trade in 2015, up from 1.4 per cent in 2011;
- Licence plate survey results showed that selected retail nodes in Guelph have a strong customer draw from beyond the municipal boundary with an

average of 42.7 per cent of licence plates collected originating from outside of Guelph;

- According to an in-home customer telephone survey Guelph residents spend at least 80 per cent of their retail dollars at stores in Guelph, except for the Furniture, Home Furnishing and Electronics category; and
- Based on the high percentage of retail dollars spent in Guelph, the retail offering in Guelph is comprehensive and reflects the relative attractiveness of the City as a shopping destination, which has not been diminished by the new retail nodes developed in surrounding municipalities.
- Key stakeholders interviewed commented on the challenges of making mixed-use development economically viable and noted opportunities do exist in the Downtown. The stakeholders also noted opportunities exist for commercial development that is not directly impacted by e-commerce, such as restaurants, and health and wellness;

### **Commercial Supply and Needs Analysis**

A commercial supply and needs analysis is a crucial undertaking in order to identify the amount of commercial land that currently exists, as well as identifying the amount of commercial development that would be required to serve future population and employment growth. Ensuring the quantity and suitability of commercial land is an important factor in not only servicing the needs of residents, but also current and future businesses. The outcomes of this analysis align with Business Development & Enterprises efforts to support the development of a locally serviced and diversified economy, while at the same time ensuring that land constraints in terms of development in the Downtown, Guelph Innovation District and the City as a whole are minimized. As part of the City of Guelph's Prosperity 2020, this supply and needs analysis will assist in pursuing the City's strategic directions of: Focusing on Investment and Growth and Investing in the Downtown.

The commercial land needs analysis was based on the current supply of commercial land and a residual demand analysis. The residual demand analysis applied the supply of commercial land against the demand for commercial land to determine commercial land needs. The analysis considered forecasted increases in population and the changing retail trends described earlier, including e-commerce, to forecast a total required gross floor area at five year time intervals including 2031 and 2041.

A complete inventory of retail and service space was conducted including occupied and vacant space. The supply analysis also quantified the amount of land available for commercial development as part of:

- active development applications (building permits, site plan approval, Official Plan Amendment or Zone Change application);
- potential future development (Downtown Intensification, Community Mixed-use Centre, Mixed-use Corridor (GID)); and
- vacant commercial land.

The supply analysis also used data from the Downtown and Guelph Innovation District Secondary Plans and assumed that active development applications and

undeveloped commercial lands would be developed to meet their maximum allowable commercial floor space area for areas designated commercial or mixed-use. No assumptions were made for future intensification or redevelopment within existing commercial developments. In addition no assumptions were made for the Clair-Maltby Secondary Plan area.

The supply inventory showed:

- The City of Guelph currently contains approximately 785,100 square metres (8,451,000 million square feet) of commercial space, an increase from 664,500 square metres (7,153,000 square feet) in 2012 and 584,100 square metres (6,286,700 square feet) in 2008;
- The largest concentration of commercial space is located within the Downtown with approximately 148,600 square metres (1.6 million square feet);
- There is approximately 58,700 square metres (632,300 square feet) of vacant space city-wide, representing a vacancy rate of 7.5 per cent which falls within the upper end of normal ranges for a balanced market (5.0 per cent to 7.5 per cent);
- On a per capita basis, the amount of commercial space (retail, service, vacant) per capita increased from 4.8 square metres (51.8 square feet) per capita in 2008 to 6 square metres (64.1 square feet) per capita in 2017;
- There is approximately 55,700 square metres (599,760 square feet) of commercial space that is part of an active development application;
- There is approximately 71,700 square metres (771,500 square feet) of potential on future development on downtown sites and lands designated as Community Mixed-use Centre and Mixed-use Corridor (GID); and
- There is approximately 41.4 hectares (102.4 acres) of vacant commercial land.

The needs analysis showed:

- By 2031 there is warranted demand for 198,700 square metres (2,138,700 square feet) of commercial space which will increase to 277,400 square metres (2,986,100 square feet) by 2041;
- There is sufficient undeveloped commercial land available to meet the market demand forecast to 2031. However there are not enough sufficiently sized parcels available to accommodate traditional larger neighbourhood and community functioning retail developments that typically require at least 2.8 hectares (seven acres); and
- It is forecast that there will be unmet demand of approximately 36,000 square metres (387,850 square feet) of commercial space by 2041.

### **Next Steps**

Following receipt of the Stage 1 report, Stage 2 commences. Stage 2 of the Commercial Policy Review involves:

- Community engagement sessions to assist in the development of a commercial vision and principles for development to 2041;
- Development of Commercial Policy Framework Alternatives;

- Community engagement on the Commercial Policy Framework Alternatives; and
- Release of a Preferred Commercial Policy Framework.

Community engagement sessions are scheduled for November 29, 2017, at City Hall from 2:30 – 4:30 p.m. and 6:30 – 8:30 p.m., to assist in the development of a commercial vision and principles for the City. The session will include a presentation to provide highlights from the Stage 1 report and workshop stations to discuss participants' shopping and service experiences and preferences that will help shape the City's new vision and principles for commercial development.

## **Financial Implications**

The Commercial Policy Review is funded through approved capital funding.

## **Consultations**

Interviews were held with key stakeholders to determine their views on commercial development trends and policies in the city. An in-home consumer telephone survey of 400 randomly selected households was also conducted to determine Guelph residents' retail expenditures.

Key stakeholders will be notified of the public release of this Information Report and notice of its release will be included in the Guelph Tribune and on the City's website.

## **Corporate Administrative Plan**

### **Overarching Goals**

Service Excellence  
Innovation

### **Service Area Operational Work Plans**

Our Services - Municipal services that make lives better  
Our People- Building a great community together  
Our Resources - A solid foundation for a growing city

## **Attachments**

ATT-1 [Commercial Policy Review: Stage 1 Commercial Analysis and Background Report](#)

## **Departmental Approval**

None.

**Report Author**

Joan Jylanne  
Senior Policy Planner



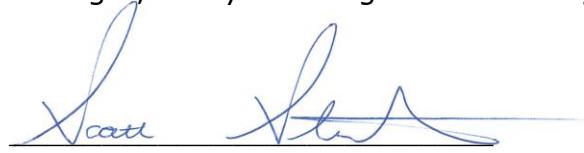
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Provincial/Federal Consultation Alert							
Title	Ministry	Consultation Deadline	Summary	Proposed Form of Input	Rationale	Lead	Link to Ministry Website
<p><b>Policy Proposal Notice</b></p> <p>Food and Organic Waste Framework</p>	Ministry of the Environment and Climate Change	January 15, 2018	<p>An EBR notice has been posted (013-1814) as a Policy Proposal Notice. The Ministry has developed a proposed Food and Organic Waste Framework as part of its commitments in the Strategy for a Waste-Free Ontario: Building a Circular Economy. The Framework consists of two complementary components:</p> <ul style="list-style-type: none"> <li>Part A: Proposed Food and Organic Waste Action Plan which outlines strategic commitments to be taken by the province to address food and organic waste; and,</li> <li>Part B: Proposed Food and Organic Waste Policy Statement under the Resource Recovery and Circular Economy Act, 2016, which provides direction to the province, municipalities, producers, IC&amp;I sector, waste management sector, and others to further the provincial interest in waste reduction and resource recovery as it relates to food and organic waste.</li> </ul> <p>The proposed Framework strives towards the achievement of the following objectives:</p> <ul style="list-style-type: none"> <li>Reduce food and organic waste</li> <li>Recover resources from food waste and organic waste</li> <li>Support resource recovery infrastructure</li> <li>Promote beneficial uses of recovered resources</li> </ul> <p>The proposed Framework includes actions and policies which support Ontarians as they prevent food and organic waste, rescue surplus food, recover resources from food and organic waste, and find sustainable end-uses for products made from organic materials.</p>	Staff comments will be submitted on the online Environmental Registry (EBR) and provided to Council via the Information Package following the consultation deadline.	<p>Staff response on the proposed Framework will be consistent with our comments given at our invited participation at Ministry Food Waste Consultation Sessions.</p> <p>The City of Guelph has a vested interest in diverting food and organic waste from landfill through the operation of our Organic Waste Processing Facility, thereby reducing our carbon footprint and increasing our diversion rate.</p> <p>Further, due to some of the proposals in the framework, there may be considerations related to City operations, capacity, promotion/education, etc.</p>	Solid Waste Resources, Environmental Services	<a href="https://www.ebr.gov.on.ca/ERS-WEB-External/displaynoticecontent.do?noticeId=MTMzOTI0&amp;statusId=MjAzNzAz&amp;language=en">https://www.ebr.gov.on.ca/ERS-WEB-External/displaynoticecontent.do?noticeId=MTMzOTI0&amp;statusId=MjAzNzAz&amp;language=en</a>



November 21, 2017

Delivered via email [comm-generalgov@ola.org](mailto:comm-generalgov@ola.org)

Grant Crack, MPP, Chair  
Sylvia Przedziecki, Clerk

Dear Standing Committee on General Government:

**RE: City of Guelph's position related to Bill 160, Ambulance Act**

The City of Guelph is monitoring, with interest, the Government's proposed changes to Bill 160 and specifically the amendments related to the Ambulance Act. We have voiced our concerns in the past, including through the submission of comments made to the province's consultations in July 2017 and are writing today to reiterate our concerns with respect to the proposed Ambulance Act amendments.

The current version of the proposed Ambulance Act opens the door to the fire-medical model. The City of Guelph, and other municipal governments, have consistently opposed this; however, it would appear that the province's position has not been wavered despite the concerns expressed.

The legislation will enable two pilot projects. These pilots are to be hosted by willing municipal governments that would allow fire fighters, certified as paramedics, to treat low-acuity patients. There is no evidence from other jurisdictions that this model works effectively. Labour relations issues will arise and the cost to municipal governments from increased fire settlements will be significant.

It is troublesome that the government remains committed to proceed with the fire-medical model. If that is the case, municipal governments need guaranteed protection from arbitrators. The protection is needed from binding interest arbitration that could replicate and force the pilots on unwilling municipal governments. There is precedence to justify this concern. It has happened before with 24-hour shift pilots imposed on fire departments across the province, despite opposition from the municipal employers. The City of Guelph cannot emphasize enough that other related legislation must be amended at the same time as the Ambulance Act.

The City of Guelph supports AMO's proposed concurrent legislative changes to the Fire Protection and Prevention Act and the Ambulance Services Collective Bargaining Act. We understand that all-party support is required to make these amendments as they are in different Acts than Bill 160 opens. On behalf of municipal governments in the province, we implore you to include these amendments in your clause-by-clause deliberations.

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MPP Grant Crack

RE: City of Guelph's position related to Bill 160, Ambulance Act

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Thank you for your anticipated attention to our position.

Sincerely,

A handwritten signature in black ink, appearing to read 'Derrick Thomson', with a long horizontal stroke extending to the left.

**Derrick Thomson**

Chief Administrative Officer

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