

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

Kawartha Pine Ridge District School Board

And

**Peterborough Victoria Northumberland and Clarington Catholic
District School Board**

MUNICIPALITY OF CLARINGTON

April 17, 2015



Enhancing Our Living and
Learning Communities

FOREWORD

The following document fulfills section 257.61 of the Education Act which states “before passing an education development charge by-law, the board shall complete an education development charges background study”. The following document contains the Education Development Charge (EDC) Background Study Report for the Kawartha Pine Ridge District School Board (KPR) and for the Peterborough Victoria Northumberland and Clarington Catholic District School Board (PVNCC) for the Municipality of Clarington.

The following document also contains the background report pertaining to a “review of the Education Development Charges policies” of the KPR and PVNCC for the County of Clarington, consistent with the legislative requirements to conduct a review of the existing EDC policies of the Boards prior to consideration of adoption of successor EDC by-laws.

ACKNOWLEDGEMENTS

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

Further, the consultants wish to acknowledge the assistance of Mr. Jim Easto, Keel Cottrelle LLP, legal counsel for the Boards on education development charge matters, as well as the expertise provided by Mr. Chris Vardon, Cushman & Wakefield Ltd. on matters dealing with site valuation.

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EXECUTIVE SUMMARY

The purpose of this report is to provide background information with respect to the calculation of the Kawartha Pine Ridge District School Board's (KPR) and the Peterborough Victoria Northumberland and Clarington District School Board's (PVNCC) Education Development Charges (EDCs) to be implemented in new EDC by-laws for the County of Clarington.

The Boards will seek input from the public and hold concurrent public meetings on May 4, 2015 to give consideration to the public submissions prior to passage of education development charges proposed for June 18, 2015 in the case of KPR and June 23, 2015 in the case of PVNCC.

Paragraph 21 of the existing EDC by-laws for KPR and for PVNCC for the Municipality of Clarington indicate that the by-laws expire on July 5, 2015 -- five years after the in force date of July 5, 2010 unless they are repealed sooner. The EDC by-law for KPR was adopted by the Board on June 25, 2010 while the PVNCC adopted its EDC by-law on June 22, 2010.

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

EDCs may be set at any level, provided that:

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

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

- building permits will be issued over the fifteen year forecast period mid-2015 to mid-2030;
- additional land is required to meet growth-related accommodation needs; and
- education development charges may be imposed on the new dwelling units.

A forecast of new dwelling units in the area in which EDCs are to be imposed, over the 15-year forecast period, were derived from a consideration of Development Charges Background Studies from the upper and lower tier municipalities.

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

The non-residential growth forecast for the Municipality of Clarington was taken from the Region of Durham 2013 Development Charge Background Study by The Regional Municipality of Durham and Watson & Associates Economists Ltd. (March 19 2013) and interpolated to determine the forecast of non-residential GFA over the 15-year forecast period.

The Municipality of Clarington's growth forecast suggests that an additional 14,976 net new occupied dwelling units will be added to the existing housing stock over the next fifteen years at an average of 1,020 units per annum. Of the net additional dwelling units, approximately 66% are anticipated to be low density (single), 17% medium density (row houses, townhouses, etc.), and the remaining 17% will be high density apartment units.

The capacity of the elementary and secondary facilities in each Board's existing inventory is reflective of the On-the-Ground (OTG) capacities approved by the Ministry for EDC purposes, and that, in the opinion of the Boards could reasonably be used to accommodate growth-related pupils.

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

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

The projected enrolment figures for the new housing development shown in the EDC submission (Chapters 7 and 8) are a cumulative fifteen-year enrolment forecast of "headcount enrolment."

Within the Municipality of Clarington, the mid-2015 to mid-2030 projections of enrolment indicate that, for the KPR, the number of elementary pupils will increase by 3,522 (11,235 – 7,713) and secondary pupils will increase by 997 (4,239 – 3,242) students. Similarly, the enrolment projections for PVNCC for the same time period indicate that the number of elementary pupils will increase by 1,890 (5,141 – 3,251) and secondary pupils will increase by 607 (2,293 – 1,686) students.

The determination of net growth related pupil places (NGRPP) and associated growth-related site needs reflect projected 2015 to 2030 growth within each of the 3 elementary review areas and 1 secondary review area for the KPR and the 3 elementary review areas and 1 secondary review area for the PVNCC. Projected growth takes into consideration housing development by community and each Board's schools impacted by the development.

Site costs and site preparation/development costs reflect a combination of the Boards' recent site acquisition experiences and appraisal research recently undertaken by Cushman & Wakefield Ltd. on its behalf.

Non-residential gross floor area (GFA) over the forecast period is projected to be 7,180,378 million additional sq. feet of "net" gross floor area for the Municipality of Clarington.

As a result of undertaking all of the necessary research and completing the EDC submission, the proposed education development charges for the Boards, where 90% of the costs are recovered from new residential development and 10% from new non-residential development is as follows:

KPR	Residential:	\$1,021 per residential dwelling unit
	Non-Residential:	\$0.24 per square foot of GFA
PVNCC	Residential:	\$710 per residential dwelling unit
	Non-Residential:	\$0.16 per square foot of GFA

By comparison, in the Municipality of Clarington in 2010, the KPR adopted an EDC by-law that enabled the collection of \$994 per residential unit and \$0.38 per square foot of non-residential GFA while PVNCC's 2010 EDC by-law enabled the collection of \$120 per residential unit and \$0.05 per square foot of non-residential GFA.

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

The EDC forms for the Boards will be submitted to the Ministry of Education for approval, on April 22, 2015. Ministerial approval of the enrolment projections and the number of sites identified is required prior to by-law adoption.

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

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

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD		
<i>% to be funded from Non-Residential Development</i>	<i>Residential Education Development Charge (Per Dwelling Unit)</i>	<i>Non-residential Education Development Charge (Cost Per Sq. Ft. of GFA)</i>
0%	\$1,134	\$0.00
5%	\$1,078	\$0.12
10%	\$1,021	\$0.24
15%	\$964	\$0.35
20%	\$908	\$0.47
25%	\$851	\$0.59
40%	\$681	\$0.95

PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD		
<i>% to be funded from Non-Residential Development</i>	<i>Residential Education Development Charge (Per Dwelling Unit)</i>	<i>Non-residential Education Development Charge (Cost Per Sq. Ft. of GFA)</i>
0%	\$789	\$0.00
5%	\$749	\$0.08
10%	\$710	\$0.16
15%	\$671	\$0.25
20%	\$631	\$0.33
25%	\$592	\$0.41
40%	\$473	\$0.66

Table S-1 outlines the determination of the net growth-related pupil places by review area for both the elementary and secondary panels for KPR while Table S-2 provides the same information for PVNCC.

TABLE S-1
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
Growth-Related Pupil Place Requirements

Elementary Panel

Review Area	Total Cumulative 15 Year Net Unit Projections (1)	% Total Forecast Municipal Residential Growth (2)	Weighted Blended EDC Pupil Yield (3)	OTG Capacity (5)	2029/30 ADE Existing Community Projections (6)	Net Growth Related Pupil Places Requirements (8)
PE01 - Newcastle Elementary	3,252	21.7%	0.2880	1,145	947	738
PE02 - Courtice Elementary	3,297	22.0%	0.2739	2,650	2,181	434
PE03 - Bowmanville Elementary	8,428	56.3%	0.2539	4,447	4,127	1,820
TOTAL	14,976	100.0%	0.2657	8,242	7,255	2,992

Secondary Panel

Review Area	Total Cumulative 15 Year Units Projections (1)	% Total Forecast Municipal Residential Growth (2)	Weighted Blended EDC Pupil Yield (3)	OTG Capacity (5)	2029/30 ADE Existing Community Projections (6)	Net Growth Related Pupil Places Requirements (8)
PS01: Municipality of Clarington	14,976	100.0%	0.0770	3,627	3,369	759
TOTAL	14,976	100.0%	0.0770	3,627	6,455	759

TABLE S-2
PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
Growth-Related Pupil Place Requirements

Elementary Panel

Review Area	Total Cumulative 15 Year Net Unit Projections (1)	% Total Forecast Municipal Residential Growth (2)	Weighted Blended EDC Pupil Yield (3)	Pupil Requirements of New Development (4)=(1*3)	OTG Capacity (5)	2028/29 ADE Existing Community Projections (6)	Net Growth Related Pupil Places Requirements (8)
CE01 - Newcastle Elementary	3,252	21.7%	0.1433	466	510	426	382
CE02 - Courtice Elementary	3,297	22.0%	0.1310	432	1,314	961	79
CE03 - Bowmanville Elementary	8,428	56.3%	0.1202	1,013	1,634	1,843	1,013
TOTAL	14,976	100.0%	0.1276	1,911	3,458	3,230	1,474

Secondary Panel

Review Area	Total Cumulative 15 Year Units Projections (1)	% Total Forecast Municipal Residential Growth (2)	Weighted Blended EDC Pupil Yield (3)	Pupil Requirements of New Development (4)=(1*3)	OTG Capacity (5)	2027/28 ADE Existing Community Projections (6)	Net Growth Related Pupil Places Requirements (8)
CS01: Municipality of Clarington	14,976	100.0%	0.0510	764	1,839	1,529	454
TOTAL	14,976	100.0%	0.0510	764	1,839	3,058	454

Chapter 1: INTRODUCTION

1.1 Background

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

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

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

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

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

generated by enrolment growth over the by-law period. In addition, a school board may pass a by-law amendment to recognize agreements approved by the board to acquire land post by-law adoption.

1.2 EDC By-law

Both the Kawartha Pine Ridge District School Board and the Peterborough Victoria Northumberland and Clarington Catholic District School Board currently have EDC by-laws applicable to new residential and non-residential development within the Municipality of Clarington area of the Boards' jurisdiction.

Both KPR and PVNCC imposed education development charge by-laws in the Municipality of Clarington in 2010 under the legislative authority of the *Education Act*, R.S.O., 1990.

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

1.3 Rationale for Considering Adoption of New EDC By-law

The existing by-laws, adopted on June 24, 2010 by KPR and on June 22, 2010 by PVNCC could remain “in force” until July 5, 2015 unless repealed or rescinded earlier by the individual Board. KPR expects to adopt a successor EDC by-law on June 18, 2015 while PVNCC expects to adopt a successor EDC by-law on June 23, 2015. The proposed inforce date for both EDC by-laws is July 1, 2015.

1.4 Policy Review Process and By-law Adoption Consultation Requirements

In order to consider the adoption of new EDC by-laws, the Boards must first undertake a review of their 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.”

EDUCATION DEVELOPMENT CHARGE BY-LAWS IN THE PROVINCE OF ONTARIO

Board	Effective Date of By-law	By-law Term	Area to which By-law Applies	Type of Charge	Res. Charge/ Unit	Non-Res. Charge/ Sq. Ft. of G.F.A.	% of Charge Attributed to Residential Development	% of Charge Attributed to Non-Residential Development
Algonquin & Lakeshore Catholic DSB	Oct-12	5 yrs	City of Kingston	A/S	\$124	\$0.00	100%	0%
Brant Haldimand Norfolk Catholic DSB	Nov-13	5 yrs	City of Brantford, County of Brant	A/S J/W/r	\$912	\$0.00	100%	0%
Conseil des écoles publiques de l'Est de l'Ontario	Apr-14	5 yrs	City of Ottawa	J/W/r	\$423	\$0.22	85%	15%
Conseil des écoles publiques de l'Est de l'Ontario	Mar-15	5 yrs	United Counties of Prescott and Russell	J/W/r	\$444	\$0.00	100%	0%
Conseil des écoles catholiques du Centre-Est	Apr-14	5 yrs	City of Ottawa	J/W/r	\$545	\$0.40	85%	15%
Dufferin-Peel Catholic DSB	Jun-14	5 yrs	Peel Region	J/W/r	\$1,343	\$0.56	75%	25%
Durham Catholic DSB	May-14	5 yrs	Durham Region (excl. Clarington)	J/W	\$786	\$0.00	100%	0%
Durham DSB	May-14	5 yrs	Durham Region (excl. Clarington)	J/W	\$1,949	\$0.00	100%	0%
Greater Essex County DSB	May-19	5 yrs	City of Windsor	J/W/r	\$305	\$0.00	100%	0%
Greater Essex County DSB	May-19	5 yrs	County of Essex and the Township of Pelee	J/W/r	\$305	\$0.00	100%	0%
Halton Catholic DSB	Jun-13	5 yrs	Halton Region	J/W	\$1,839	\$0.47	85%	15%
Halton DSB ¹	Jun-13	5 yrs	Halton Region	J/W	\$3,380	\$0.87	85%	15%
Hamilton-Wentworth Catholic DSB	Aug-14	5 yrs	City of Hamilton	J/W	\$885	\$0.34	85%	15%
Hamilton-Wentworth DSB	Aug-14	5 yrs	City of Hamilton	J/W	\$1,039	\$0.39	85%	15%
Kawartha Pine Ridge DSB	Jul-10	5 yrs	Clarington	A/S	\$994	\$0.38	90%	10%
Ottawa Catholic SB	Apr-14	5 yrs	City of Ottawa	J/W	\$466	\$0.34	83%	17%
Ottawa-Carleton DSB	Apr-14	5 yrs	City of Ottawa	J/W	\$723	\$0.82	80%	20%

Board	Effective Date of By-law	By-law Term	Area to which By-law Applies	Type of Charge	Res. Charge/ Unit	Non-Res. Charge/ Sq. Ft. of G.F.A.	% of Charge Attributed to Residential Development	% of Charge Attributed to Non-Residential Development
Peel DSB	Jun-14	5 yrs	Peel Region	J/W	\$3,224	\$0.45	90%	10%
Peterborough, Victoria, Northumberland & Clarington Catholic DSB	Jul-10	5 yrs	Clarington	A/S	\$120	\$0.05	90%	10%
Simcoe Muskoka Catholic DSB	Nov-13	5 yrs	Simcoe County	J/W/r	\$448	\$0.12	90%	10%
Simcoe County DSB	Nov-13	5 yrs	Simcoe County	J/W	\$1,311	\$0.35	90%	10%
Toronto Catholic DSB ¹	Jul-13	5 yrs	City of Toronto	J/W (with exempt areas)	\$841	\$0.67	75%	25%
Upper Grand DSB	Aug-14	5 yrs	Dufferin County	J/W/r	\$832	\$0.00	100%	0%
Upper Grand DSB	Aug-14	5 yrs	Wellington County	J/W/r	\$1,567	\$0.00	100%	0%
Waterloo Catholic DSB	May-11	5 yrs	Regional Municipality of Waterloo	J/W	\$425	\$0.31	80%	20%
Waterloo Region DSB	May-11	5 yrs	Regional Municipality of Waterloo	J/W	\$1,266	\$0.92	80%	20%
Wellington Catholic DSB	Aug-14	5 yrs	Wellington County	J/W	\$317	\$0.00	100%	0%
York Catholic DSB	Jul-14	5 yrs	York Region	J/W	\$991	\$0.17	90%	10%
York Region DSB	Jul-14	5 yrs	York Region	J/W	\$3,349	\$0.58	90%	10%

Updated March, 2015

Rates for the Toronto Catholic District School Board are phased in as follows:

July 1, 2014 to June 30, 2015, \$841.00 per unit and \$0.67 per sq ft of GFA

July 1, 2015 to June 30, 2016, \$990.00 per unit and \$0.71 per sq ft of GFA

July 1, 2016 to June 30, 2017, \$1,150.00 per unit and \$0.83 per sq ft of GFA

July 1, 2017 to June 30, 2018, \$1,309.00 per unit and \$0.94 per sq ft of GFA

“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 Boards have existing EDC by-laws 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 Boards’ review of their education development charge policies. This meeting will be held on

May 4, 2015 at the Clarington Central Secondary School, located at 200 Clarington Blvd., Bowmanville. Information respecting a review of the Boards' policies is being made available to the public as part of this document. This information, entitled "Review of Education Development Charges Policies", is found in Appendix B.

The scheduling of the second public meeting requires that the proposed by-law and the new education development charge background study are made available to the public at least two weeks prior to the meeting, and to ensure that any person who attends the meeting "may make representations relating to the by-law" (s.257.63(2)). This meeting is scheduled to immediately follow the first public meeting on May 4, 2015.

The Boards met with interested development and municipal community stakeholders on April 1, 2015, to review in detail, the basis for the proposed charge and to understand any concerns that stakeholders may have.

Finally, each Board is expected to consider the adoption of a new education development charge by-law for the Municipality of Clarington. KPR is expected to do so on June 18, 2015 at 7:00 p.m. at the Board Office located at 1994 Fisher Drive, Peterborough and PVNCC is expected to do so on June 23, 2015 at 7:00 p.m. at the Board Office located at 1355 Lansdowne Street West, Peterborough.

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

1.5 Legislative Requirements to Adopt a New EDC By-law

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

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

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



EDUCATION DEVELOPMENT CHARGES
The Municipality of Clarington
NOTICE OF PUBLIC MEETINGS

FIRST MEETING
- POLICY REVIEW PUBLIC MEETING -
Monday, May 4, 2015 @ 7:00 p.m.
Clarington Central Secondary School (Library)
200 Clarington Blvd., Bowmanville

TAKE NOTICE that on May 4, 2015 the Kawartha Pine Ridge District School Board and the Peterborough Victoria Northumberland Clarington Catholic District School Board will hold a joint public meeting pursuant to section 257.60 of the Education Act.

The purpose of the meeting will be to review the current education development charge policies of both Boards and to solicit public input. Any person who attends the meeting may make a representation to the Boards in respect of the policies. The Boards will also consider any written submissions.

A Policy Review Document setting out the Boards' policies for the current education development charge by-laws will be available during regular office hours on or after April 17, 2015 at both Boards' administration offices (addresses given below).

IMMEDIATELY FOLLOWED BY: SECOND MEETING
- SUCCESSOR BY-LAW PUBLIC MEETING -
Monday, May 4, 2015 @ 7:15 p.m.
Clarington Central Secondary School (Library)
200 Clarington Blvd., Bowmanville

TAKE NOTICE that on May 4, 2015, the Kawartha Pine Ridge District School Board and the Peterborough Victoria Northumberland Clarington Catholic District School Board will hold a joint public meeting 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 the successor by-laws and to inform the public generally about the education development charge proposal of each Board. Any person who attends the meeting may make a representation to the Boards in respect of the proposals. The Boards 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 an education development charge by-law.

The education development charge Background Study required under section 257.61 of the Education Act (including the proposed EDC by-laws) sets out each Board's education development charge proposal and will be available on or after April 17, 2015, during regular office hours at the Boards' administration offices (addresses given below).

**THIRD PUBLIC MEETING
- IN CONSIDERATION OF BY-LAW ADOPTION -**

**Thursday, June 18, 2015 @ 7:00 p.m.
Education Centre, Board Room
1994 Fisher Drive, Peterborough
for the Kawartha Pine Ridge District School Board**

and

**Tuesday, June 23, 2015 @ 7:00 p.m.
The Peter L. Roach Catholic Education Centre, Board Room
1355 Lansdowne Street West, Peterborough
for the Peterborough Victoria Northumberland Clarington
Catholic District School Board**

TAKE NOTICE that on Thursday, June 18, 2015, Kawartha Pine Ridge District School Board will hold a third public meeting.

AND TAKE NOTICE that on Tuesday, June 23, 2015, the Peterborough Victoria Northumberland Clarington Catholic District School Board will hold a third public meeting.

The purpose of the third public meeting for each Board is to consider the enactment of successor EDC by-laws in the Municipality of Clarington. Any person who attends the meetings may make representations to the Boards in respect of this matter. Written submissions, filed in advance of the meeting, will also be considered.

Should new by-laws be passed, collection of education development charges pursuant to such by-laws may commence on July 1, 2015.

All interested parties are invited to attend the three public meetings.

The Boards 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 Boards as a delegation, as well as any comments or requests for further information regarding this matter, should be submitted to:

Dean MacDonald, Senior Manager of Planning and Pupil Accommodation
Kawartha Pine Ridge District School Board
1994 Fisher Dr, PO Box 7190
Peterborough, ON K9J 7A1
Telephone 705-742-9773 (ext. 2035)
Facsimile 705-742-7281

AND Stephen MacPhee, Manager of Purchasing, Planning & Facility Administration
Peterborough, Victoria Northumberland and Clarington Catholic District School Board
1355 Lansdowne St W
Peterborough, ON K9J 7M3
Telephone 705-748-4861 (ext. 234)
Facsimile 705-748-4293

Cathy Abraham,
Chairperson of the Board
Kawartha Pine Ridge District School Board

Michelle Griepsma,
Chairperson of the Board
Peterborough Victoria Northumberland and
Clarington Catholic District School Board

W. R. (Rusty) Hick,
Director of Education
Kawartha Pine Ridge District School Board

Barbara McMorrow,
Director of Education/Secretary Treasurer
Peterborough Victoria Northumberland and
Clarington Catholic District School Board

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

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

1.6 Eligibility to Impose Education Development Charges and Form A

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

Kawartha Pine Ridge District School Board

KPR is eligible to impose a new EDC by-law based on the Board’s balance in its EDC account being less than the amount required to pay outstanding commitments to meet growth-related net education land costs, as calculated for the purposes of determining the EDCs imposed under that by-law. The Board’s deficit in its EDC Account is (\$1,930,833).

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
Form A - Eligibility to Impose an EDC
(The entire jurisdiction of the Board)

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 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Average Projected Enrolment Over Five Years	
24,504	21,347	21,174	21,118	20,989	21,137	21,153	-3,351

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

A.1.2: CAPACITY TRIGGER CALCULATION - SECONDARY PANEL

Secondary Panel Board-Wide Capacity	Projected Secondary Panel Average Daily Enrolment (ADE)						Secondary Projected Enrolment less Capacity
	Year 1 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Average Projected Enrolment Over Five Years	
13,266	9,495	9,316	9,148	9,061	9,018	9,208	-4,058

A.2: EDC FINANCIAL OBLIGATIONS (Estimated to April 2015)

Adjusted Outstanding Principal:	\$6,291,239
Less Adjusted EDC Account Balance:	\$4,360,406
Total EDC Financial Obligations/Surplus:	-\$1,930,833

Peterborough Victoria Northumberland and Clarington Catholic District School Board

The PVNCC is eligible to impose a new EDC by-law based on the fact that the Board's five-year average elementary projected enrolment is greater than the available space in the system by 207 students. As well, the balance in its EDC account is less than the amount required to pay outstanding commitments to meet growth-related net education land costs, as calculated for the purposes of determining the EDCs imposed under that by-law. The Board's deficit in its EDC Account is (\$371,354).

PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
Form A - Eligibility to Impose an EDC
(The entire jurisdiction of the Board)

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 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Average Projected Enrolment Over Five Years	
10,531	10,132	10,443	10,756	11,051	11,310	10,738	207

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

A.1.2: CAPACITY TRIGGER CALCULATION - SECONDARY PANEL

Secondary Panel Board-Wide Capacity	Projected Secondary Panel Average Daily Enrolment (ADE)						Secondary Projected Enrolment less Capacity
	Year 1 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Average Projected Enrolment Over Five Years	
5,286	4,449	4,322	4,277	4,263	4,309	4,324	-962

A.2: EDC FINANCIAL OBLIGATIONS (Estimated to April 2015)

Adjusted Outstanding Principal:	\$954,960
Less Adjusted EDC Account Balance:	\$583,606
Total EDC Financial Obligations/Surplus:	-\$371,354

1.7 Background Study Requirements

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

1. estimates of the anticipated amount, type and location of residential development for each year of the fifteen year forecast period, as well as the anticipated non-residential forecast of gross floor area in the Municipality of Clarington - 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 – KPR and Chapter 8 – PVNCC;
4. for each school in the each Board’s inventory, the number of existing pupil places and the number of pupils who attend the school – Chapter 7 – KPR; Chapter 8 – PVNCC;
5. for every existing elementary and secondary pupil place in each Board’s jurisdiction that each Board does not intend to use, an explanation as to why the Board does not intend to do so – Chapter 7 – KPR; Chapter 8 – PVNCC;
6. estimates of the education land cost, the net education land cost, and the growth-related net education land costs required to provide the projected new pupil places in item #2, the location of the site needs, the acreage for new school sites, including the area that exceeds the maximum set out in section 2 of O.Reg. 20/98, an explanation of whether the costs of the excess land are education land costs and if so, why – Chapter 7 – KPR; Chapter 8 – PVNCC;
7. the number of pupil places that each board estimates will be provided by the school to be built on the site and the number of those pupil places that each board estimates will be used to accommodate the new pupils in item #2 – Chapter 7 – KPR; Chapter 8 – PVNCC;
8. a statement of each board’s policy concerning possible arrangements with municipalities, school boards or other persons or bodies in the public or private sector, including arrangements of a long-term or co-operative nature, which would provide accommodation for the new pupils in item #2, without imposing EDCs, or with a reduction in such charges – Appendix C1 and C2.
9. a statement from each board indicating that it has reviewed its operating budget for savings that could be applied to reduce growth-related net education land costs, and the amount of any savings which it proposes to apply, if any – Appendix C1 and C2.

The KPR and the PVNCC have developed assumptions in the calculations on which their EDC by-laws will be based.

The legislation stipulates that an education development charge by-law may only be passed within the one-year period following the completion of the education development charge background study. This report,

dated April 17, 2015, will be available to the Boards as the Trustees of each Board consider adoption of their respective by-laws on June 18, 2015 (KPR) and June 23, 2015 (PVNCC).

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

1.8 EDC Study Process

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

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

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

Chapter 2 METHODOLOGICAL APPROACH

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

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

A description of each step in the calculation process resulting in an EDC for each of the three by-laws proposed is set out below.

2.1 Planning Component

Step 1 - Determine the anticipated amount, type, and location of residential development over the 15-year period (i.e., building permits to be issued) and for which education development charges would be imposed during the mid-2015 to mid-2030 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:

1. Greater Golden Horseshoe Growth Forecasts to 2041 – Technical Report. Hemson Consulting Inc. November 2012.
2. Memorandum to the Municipality of Clarington, Re: Clarington Community Forecast Update 2013. Hemson Consulting Ltd. June 25, 2013.
3. Region of Durham Regional Development Charges Background Study. The Regional Municipality of Durham and Watson & Associates Economists Ltd. March 19, 2013.
4. 2013 Growth Trends Review. Planning Services Department. Municipality of Clarington. 2014.

The occupied dwelling unit forecast derived as the basis for the determination of the proposed EDC charge is net of the statutory exemptions related to demolitions and conversions.

The non-residential growth forecast for the Municipality of Clarington was taken from the Region of Durham 2013 Development Charge Background Study by The Regional Municipality of Durham and Watson & Associates Economists Ltd. (March 19 2013) and interpolated to determine the forecast of non-residential GFA over the 15-year forecast period.

Step 2 - The draft by-law structure is based on an area-specific approach that considers only the Municipality of Clarington in the proposed EDCs for both KPR and PVNCC. The review area boundaries are consistent with those in place under the 2010 Background Studies, man-made barriers including major arterial roads, railway crossings and industrial areas, municipal boundaries, travel distances within each Board's transportation policies, program requirements etc.

Step 3 - Utilize the School Facilities Inventory information to determine the Ministry-approved OTG (On-the-Ground) capacities 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 each 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, over the fifteen-year forecast period. Enrolment projections that distinguish the pupil requirements of the existing community (elementary to secondary retention, the number of future JK subscriptions, and the by-grade advancement of the existing student population) from the pupil requirements of new development (the number of pupils anticipated to be generated by new development within the areas to which each by-law will apply and over the next 15 years) were prepared by the consultants and reviewed by Board Planning staff. Finally, the enrolment analyses assume that any pupils temporarily accommodated outside of their resident attendance area are returned to their resident area.

Step 7 - Determine the number of "available" pupil places by subtracting the Year 2029/30 projected head count enrolment (to reflect FDK) from the total capacity for the review area. The Boards are entitled to exclude any available pupil places that in the opinion of each Board could not reasonably be used to accommodate enrolment growth.

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

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

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

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

2.2 Financial Component:

Step 1 - Identify the land acquisition costs (on a per acre basis) in 2015 dollars. Where purchase agreements have been finalized, incorporate the final purchase price.

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

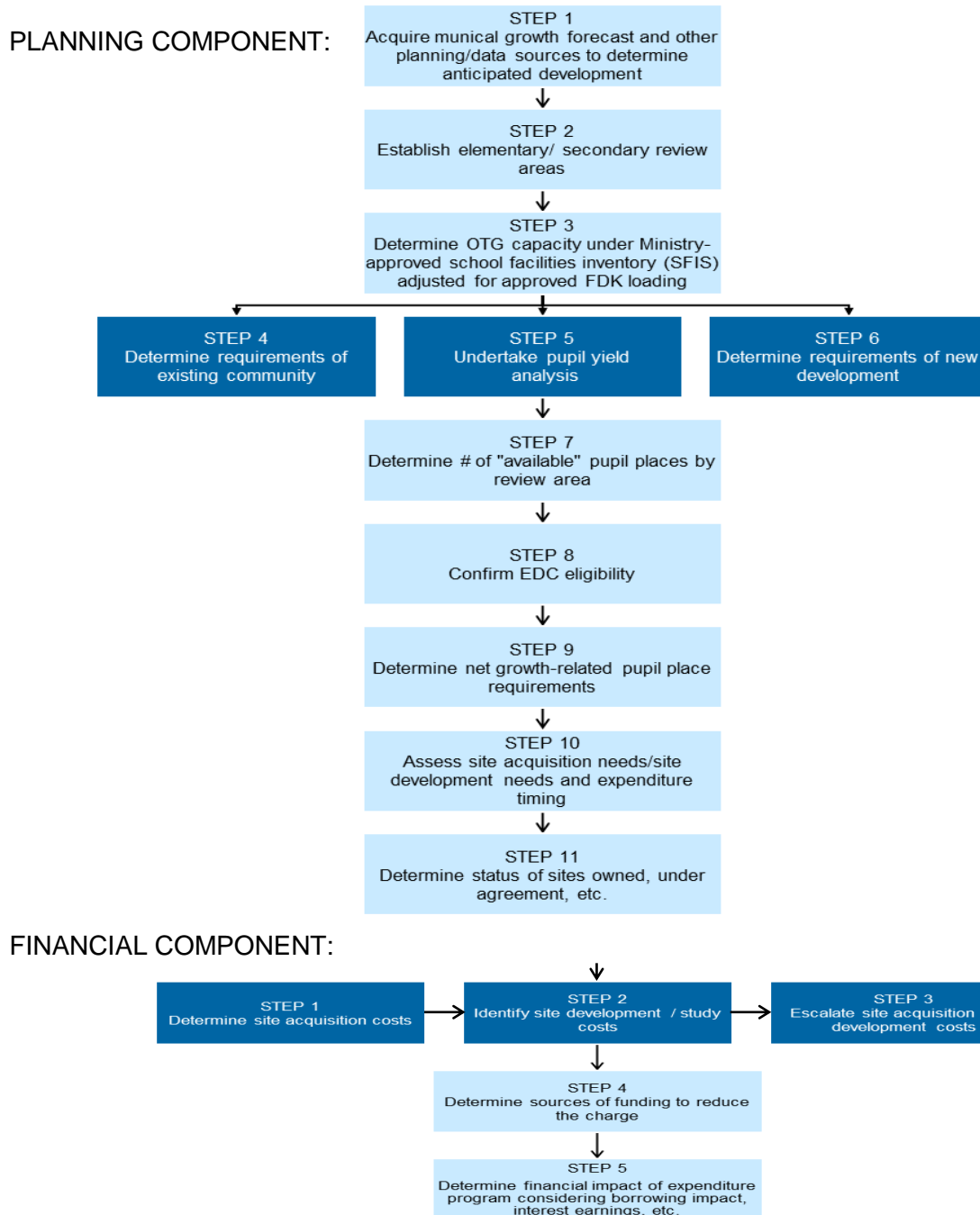
Step 3 - Apply an appropriate indexation factor to site preparation/development costs to recognize increased labour and material costs over time.

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

1. Each Board’s policy on alternative accommodation arrangements;
2. Each Board’s policy on applying any operating budget surplus to reduce net education land costs;
3. Any surplus funds in each Board’s existing EDC accounts which should be applied to reduce the charge;

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

FIGURE 2-1 -- METHODOLOGICAL APPROACH



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)

Chapter 3: JURISDICTION OF THE BOARD

3.1 Legislative Provisions

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

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

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

Maps 3-1 to 3-2 found at the end of this chapter, outline the geographic jurisdiction analyzed in this EDC Background report for KPR while Maps 3-3 to 3-4 outlines the geographic jurisdiction for PVNCC.

3.2 Analysis of Pupil Accommodation by “Review Area”

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

1. The needs of the existing community (at the end of the 15-year forecast period) must take priority over the needs resulting from new development in the construction of additional pupil places.
2. Pupils generated from new development fill any surplus available OTG capacity.

3. Pupils generated from new development within the review area must take priority over the “holding” accommodation needs of other review areas.

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

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

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

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

The rationale for the review area boundaries for the elementary and secondary panels of each 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. Current school attendance boundaries;
- c. Travel distances to schools consistent with each Board’s transportation policies;

- d. Municipal boundaries;
- e. Manmade or natural barriers (e.g. existing or proposed major arterial roadways, expressways such as Highway 401 and Highway 115, 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 area-specific approach to calculating education development charges:

The KPR has 3 elementary review areas and 1 secondary review area as illustrated on Maps 3-1 to 3-2 while PVNCC also has 3 elementary review areas and 1 secondary review area as illustrated on Maps 3-3 to 3-4. These maps are found at the end of this chapter.

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

Kawartha Pine Ridge District School Board Elementary Review Areas

Municipality of Clarington

PE01 – Newcastle

PE02 – Courtice

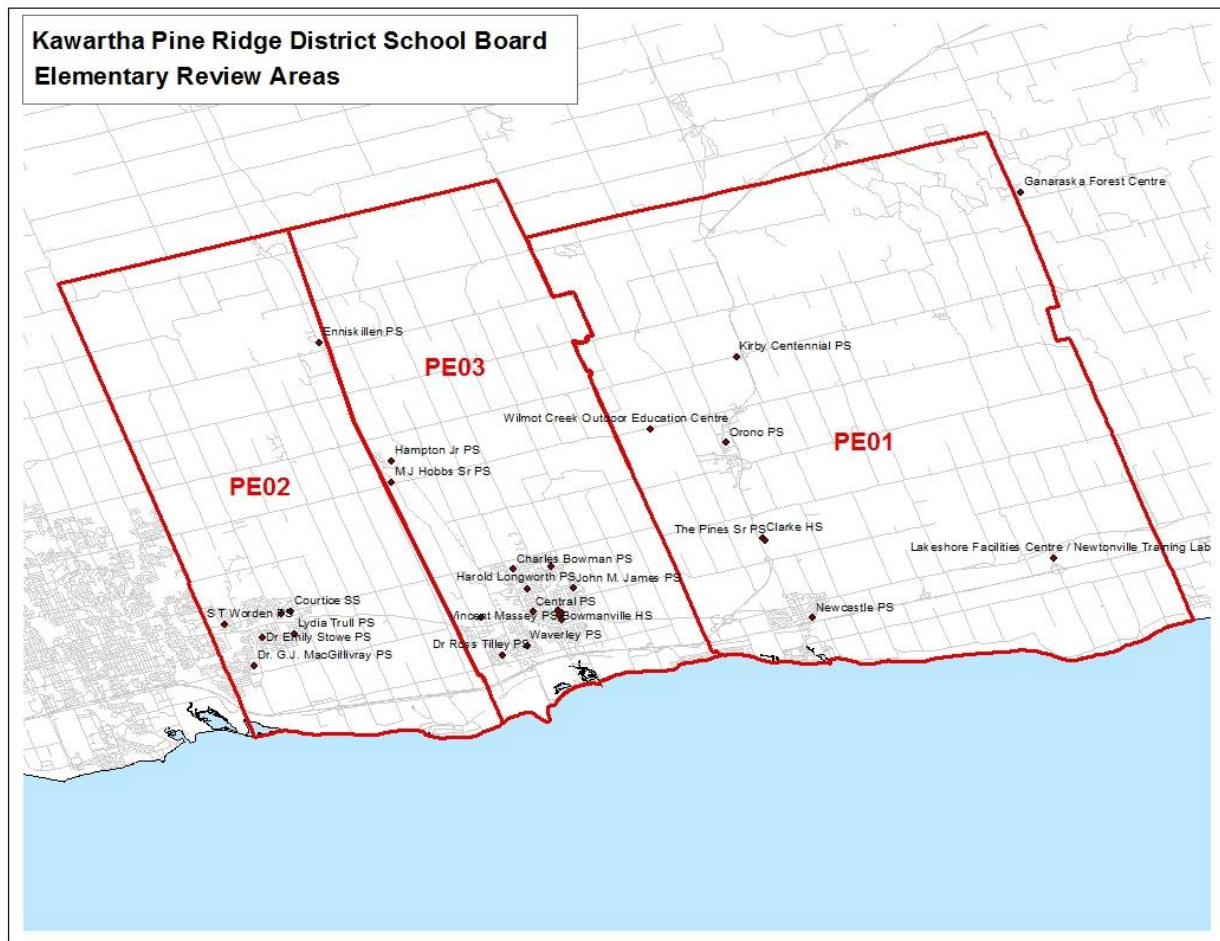
PE03 – Bowmanville

Kawartha Pine Ridge District School Board Secondary Review Areas

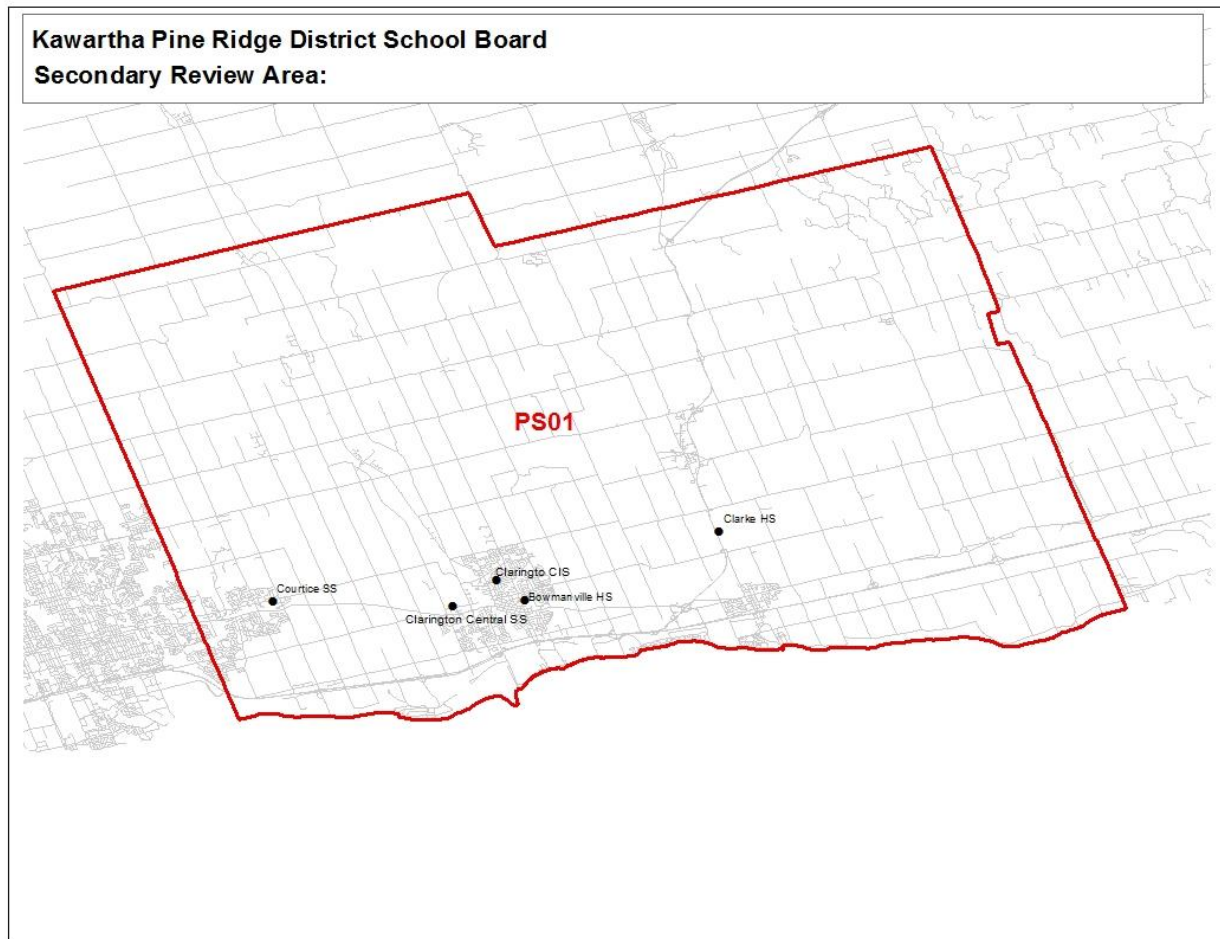
Municipality of Clarington

PS01 -- Clarington

MAP 3-1



MAP 3-2



**Peterborough Victoria Northumberland and Clarington Catholic District School Board Elementary
Review Areas**

Municipality of Clarington

CE01 – Newcastle

CE02 – Courtice

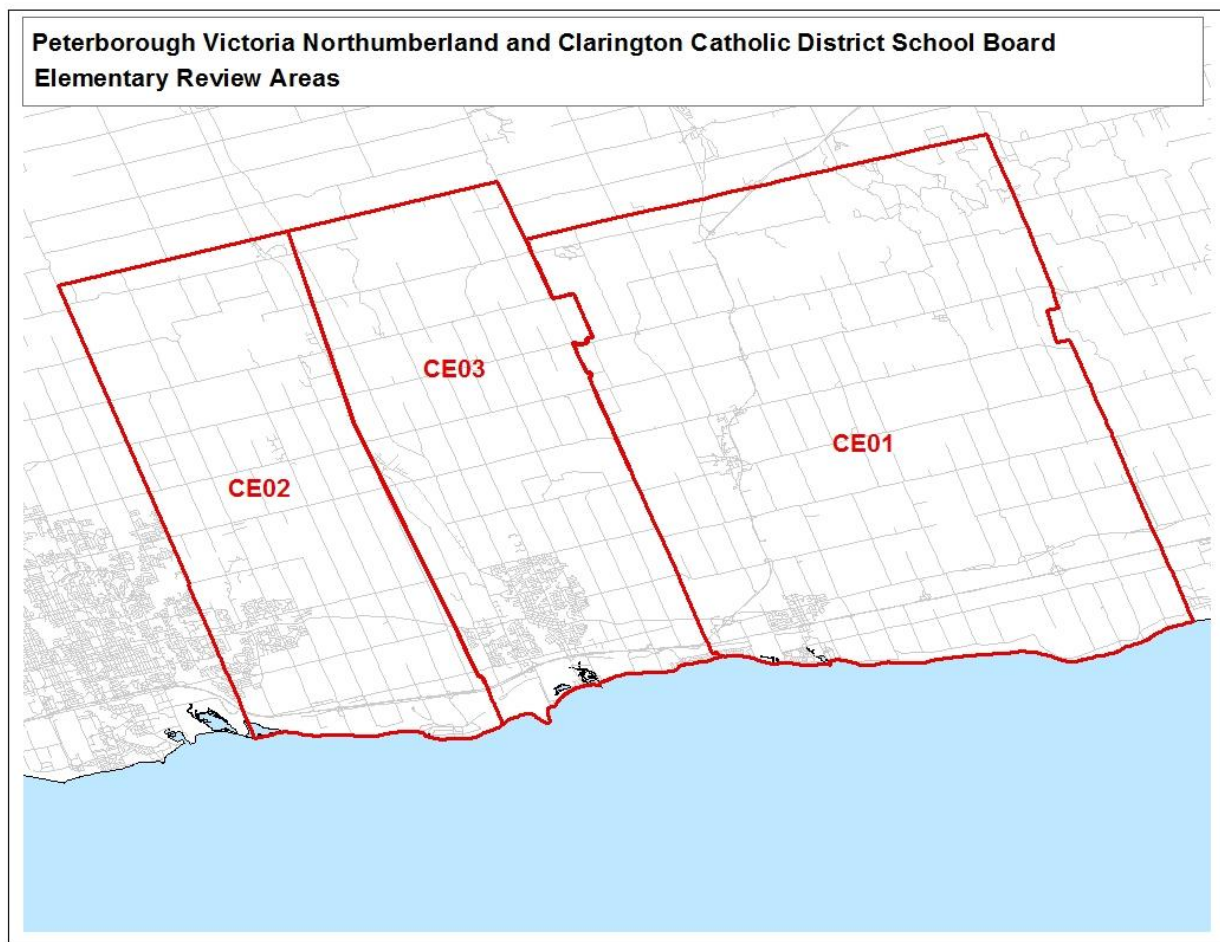
CE03 – Bowmanville

Peterborough Victoria Northumberland and Clarington Catholic District School Board Secondary Review Areas

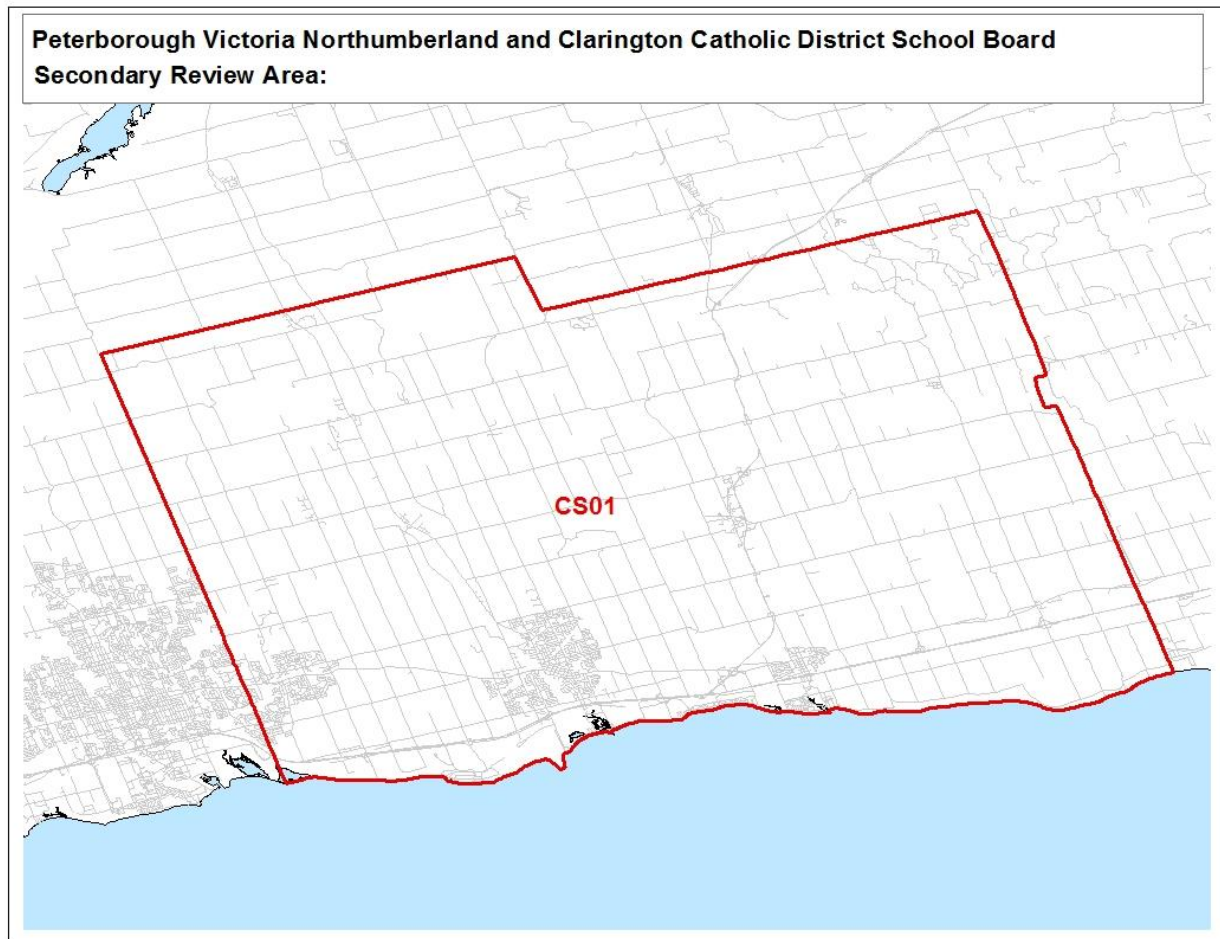
Municipality of Clarington

CS01 -- Clarington

MAP 3-3



MAP 3-4



Chapter 4: RESIDENTIAL/NON-RESIDENTIAL GROWTH FORECAST

4.1 Background

This section of the report deals with the forecast of residential and non-residential development over the mid-2015 to mid-2030 fifteen-year forecast period. The parameters of the growth forecasts, particularly with regards to the anticipated timing, location and type of residential development, are critical components of the overall EDC process because of the inextricable link between new units and new pupil places. The location of development is particularly important to the determination of additional growth-related site needs. Therefore, every effort was made to consider a variety of forecasts, planning policies, economic perspectives (short term and longer term) etc.

4.2 Legislative Requirements

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

- “An EDC background study shall include estimates of the anticipated amount, type and location of residential and non-residential development.”; (Section 257.61(2) of the *Education Act*)
- “Estimate the number of new dwelling units in the area in which the charges are to be imposed for each of the 15 years immediately following the day the by-law comes into force.”; (O.Reg 20/98), Section 7(2)
- “If charges are to be imposed on non-residential development, the board shall determine the charges and the charges shall be expressed as either:
 - (a) a rate applied to the gross floor area (GFA) of the development;
 - (b) a rate applied to the declared value of development.” (O.Reg 20/98), Section 7(10)
- “If the board intends to impose different charges on different types of residential development, the board shall determine the percentage of the growth-related net education land cost to be funded by charges on residential development, and that is to be funded by each type of residential development.” (O.Reg. 20/98), Section 9.1

- “The Board shall choose the percentage of the growth-related net education land costs that is to be funded by charges on residential development and the percentage, if any, that is to be funded by the charges on non-residential development. The percentage that is to be funded by non-residential development shall not exceed 40 percent.” (O.Reg 20/98), Section 7(8))
- The EDC Guidelines state that “boards are encouraged to ensure that projections for growth are consistent with that of municipalities.”

4.3 Residential Growth Forecast and Forms B and C

4.3.1 Historical Context

Municipality of Clarington

Over the 2009 to 2013 period, new dwelling units in the Municipal of Clarington were constructed at an average rate of 529 units per annum. The composition of units for which building permits were issued between 2009 and 2013 indicates that 77.4% were low density units, 18.3% medium density units and the remaining 4.3% of the units are high density. Table 4-1 illustrates historical building permits for the Municipality of Clarington.

TABLE 4-1
Municipality of Clarington
Building Permits

	2009	2010	2011	2012	2013	Total
Single Dwellings	207	345	552	324	202	1,630
Double Dwellings	46	116	84	88	84	418
Row Dwellings	7	111	137	108	121	484
Apartments	3	20	90	0	0	113
Total	263	592	863	520	407	2,645

4.3.2 Methodological Approach

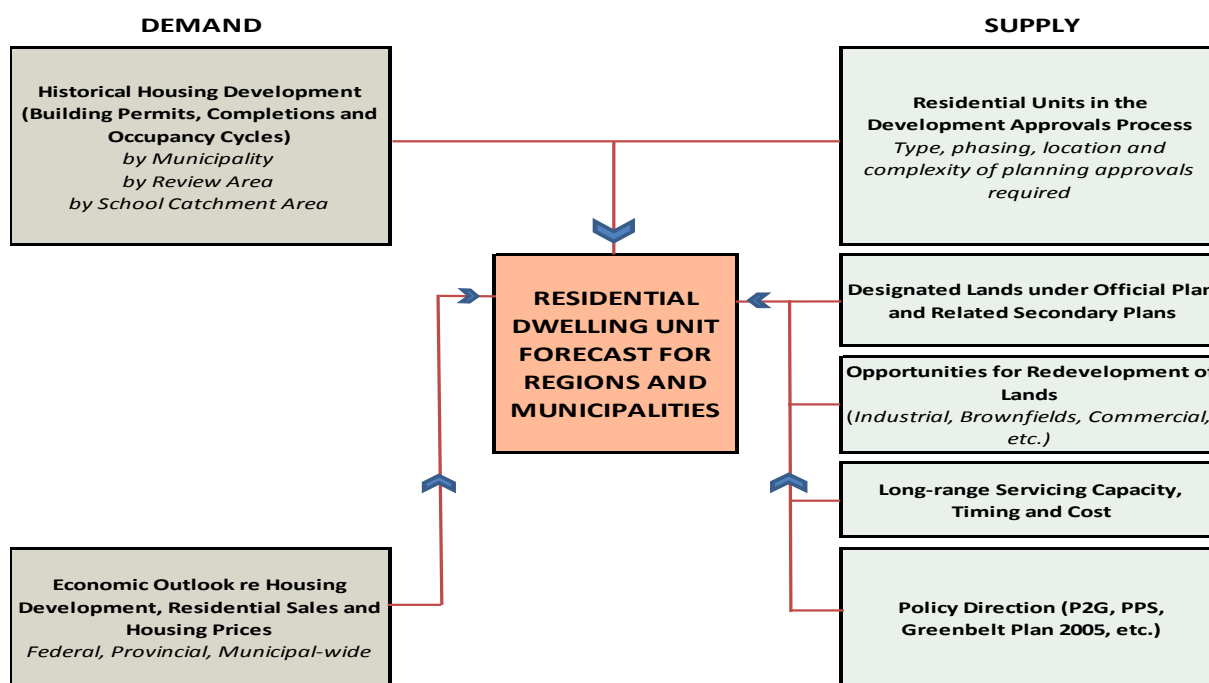
The determination of the timing, type and location of development incorporates both a top-down and a bottom-up approach. The following background information was reviewed in establishing the number of units to be constructed and occupied in the Municipality of Clarington over the 15-year forecast period,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

5. Greater Golden Horseshoe Growth Forecasts to 2041 – Technical Report. Hemson Consulting Inc. November 2012.
6. Memorandum to the Municipality of Clarington, Re: Clarington Community Forecast Update 2013. Hemson Consulting Ltd. June 25, 2013.
7. Region of Durham Regional Development Charges Background Study. The Regional Municipality of Durham and Watson & Associates Economists Ltd. March 19, 2013.
8. 2013 Growth Trends Review. Planning Services Department. Municipality of Clarington. 2014

Figure 4-1 illustrates the elements considered in deriving the residential growth forecast for EDC purposes:

FIGURE 4-1

Residential Growth Forecast: Proposed Methodology
Household Formation Projection Model



In order to prepare 15-year projections of new occupied dwelling units in the Municipality of Clarington for which education development charges are to be imposed, the consultants also included statutory residential exemptions as described below.

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 dwelling and other residential building. A reduction of 323 units, or 2.1% of the total number of units has been made on the EDC dwelling unit forecast.

Replacement Dwelling Unit Exemption

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

4.3.3 Net New Units and Forms B and C

Table 4-2 and 4-3 summarizes the Municipality of Clarington’s housing forecast by unit type for the mid-2015 to mid-2030 period for each review area for Kawartha Pine Ridge DSB and Peterborough Victoria Northumberland and Clarington Catholic DSB respectively.

Table 4-4 which follows, summarizes Forms B and C of the EDC Submission associated with the proposed EDC by-laws.

TABLE 4-2
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
Growth-Related Pupil Place Requirements

Elementary Panel

Review Area	Total Cumulative 15 Year Net Unit Projections (1)	SINGLES	MEDIUM DENSITY	APARTMENTS
PE01 - Newcastle Elementary	3,252	2,522	327	404
PE02 - Courtice Elementary	3,297	2,221	590	487
PE03 - Bowmanville Elementary	8,428	5,085	1,649	1,695
TOTAL	14,976	9,827	2,565	2,585

Secondary Panel

Review Area	Total Cumulative 15 Year Units Projections (1)	SINGLES	MEDIUM DENSITY	APARTMENTS
PS01: Municipality of Clarington	14,976	9,827	2,565	2,585
TOTAL	14,976	9,827	2,565	2,585

TABLE 4-3
PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL
Education Development Charges Submission 2015
Growth-Related Pupil Place Requirements

Elementary Panel

Review Area	Total Cumulative 15 Year Net Unit Projections (1)	SINGLES	MEDIUM DENSITY	APARTMENTS
CE01 - Newcastle Elementary	3,252	2,522	327	404
CE02 - Courtice Elementary	3,297	2,221	590	487
CE03 - Bowmanville Elementary	8,428	5,085	1,649	1,695
TOTAL	14,976	9,827	2,565	2,585

Secondary Panel

Review Area	Total Cumulative 15 Year Units Projections (1)	SINGLES	MEDIUM DENSITY	APARTMENTS
CS01: Municipality of Clarington	14,976	9,827	2,565	2,585
TOTAL	14,976	9,827	2,565	2,585

TABLE 4-4
PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD AND KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
Forms B/C - Dwelling Unit Summary

PROJECTION OF NET NEW DWELLING UNITS ¹

	Year 1 2014/ 2015	Year 2 2015/ 2016	Year 3 2016/ 2017	Year 4 2017/ 2018	Year 5 2018/ 2019	Year 6 2019/ 2020	Year 7 2020/ 2021	Year 8 2021/ 2022	Year 9 2022/ 2023	Year 10 2023/ 2024	Year 11 2024/ 2025	Year 12 2025/ 2026	Year 13 2026/ 2027	Year 14 2027/ 2028	Year 15 2028/ 2029	Total All Units
Municipality of Clarington																
SINGLES	467	467	656	656	656	656	656	691	691	691	691	691	789	789	789	10,035
MEDIUM DENSITY	144	144	169	169	169	169	169	184	184	184	184	184	186	186	186	2,614
Less: Intensification Adjustment																
APARTMENTS	130	130	130	130	130	130	130	206	206	206	206	206	237	237	237	2,650
Less: Intensification Adjustment all unit types																-323
Total	740	740	955	955	955	955	955	1,082	1,082	1,082	1,082	1,082	1,212	1,212	1,212	14,976
Summary Totals																
Grand Total Gross New Units in By-Law Area																15,299
Less: Statutorily Exempt Units in By-Law Area																323
Total Net New Units in By-Law Area																14,976

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

4.4 Non-Residential Growth Forecast and Form D

The non-residential growth forecast indicates that a total of 10,257,683 square feet of non-residential gross floor area (GFA) space is anticipated for the Municipality of Clarington over the 15 year forecast period. Industrial and institutional additions, municipal and school board properties, which are exempt under the legislation, are expected to total 3,077,305 square feet of GFA over that same time period. Therefore, an education development charge by-law can be applied against a net of 7,180,378 square feet of net gross floor area. The non-residential growth forecast for the Municipality of Clarington was taken from the Region of Durham 2013 Development Charge Background Study by The Regional Municipality of Durham and Watson & Associates Economists Ltd. (March 19 2013) and interpolated to determine the forecast of non-residential GFA over the 15-year forecast period.

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

TABLE 4-5
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD AND PETERBOROUGH VICTORIA
NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
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:	10,257,683
Less: Board-Determined Gross Floor Area From Exempt Development:	3,077,305
Net Estimated Board-Determined Gross Floor Area:	7,180,378

Chapter 5: DEMOGRAPHIC TRENDS AND FUTURE ENROLMENT EXPECTATIONS

5.1 Demographic and Enrolment Trends

Kawartha Pine Ridge District School Board

The KPR provides education services for the communities located in Peterborough and the Kawarthas area to the north and south to Brighton, Cobourg, Port Hope and Bowmanville areas along Lake Ontario. The Board is bounded by Hastings County to the east, Victoria County to the west, and the City of Oshawa with Apsley in the northernmost location. The Board operates 76 elementary and 16 secondary schools. Its average daily enrolment for the 2013-14 school year was 30,308 students (19,465 elementary ADE and 10,843 secondary ADE).

Peterborough Victoria Northumberland and Clarington Catholic District School Board

The PVNCC provides education services for the communities located in Peterborough and the Kawarthas area including the City of Kawartha Lakes to the north and south to Brighton, Cobourg, Port Hope and Bowmanville areas along Lake Ontario. The Board is bounded by Hastings County to the east, Victoria County to the west, and the City of Oshawa with Apsley in the northernmost location. The Board operates 31 elementary and 6 secondary schools. Its average daily enrolment for 2013-14 was 13,212 students (8,633 elementary ADE and 4,579 secondary ADE).

This chapter will include historical demographic information for the Municipality of Clarington and the historical enrolment for the KPR and the PVNCC with emphasis on the information gathered from Statistics Canada.

5.1.1 Overview

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

The 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 each Board's jurisdiction? Many school boards can and will experience areas of school age population growth offset by areas of decline. Further, it is possible to experience growth in secondary school age children due to in-migration, but a decline in elementary school age population.

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

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

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

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

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

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

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

5.1.2 Population and Housing

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

Table 5-1 compares the pre-school and school age population between 2001-2006 and 2006-2011 Census periods in the Municipality of Clarington, illustrating the changing trends which will impact future enrolment growth. As shown in the table, the pre-school age population (ages 0-3) decreased by 205 persons or 5.3% between 2001 and 2006 and increased between 2006 and 2011 by 205 persons or 5.6%.

The elementary school age population (ages 4-13) decreased by 325 persons or 2.6% from 2001 to 2006. This same age group continued to experience a decrease between the 2006 and 2011 Census period when the cohort decreased by 1,255 persons.

From 2001 to 2006 the secondary school age population (ages 14-17) increased by 1,235 persons or 29.9%. During the 2006 to 2011 Census period, secondary school age population increased by 195 persons or 3.6%.

Table 5-1 also calculates the school age population per household in the Municipality of Clarington. It is important to evaluate the change in the school age population measured against the change in the number of occupied households. Analysis of the population by household indicates that during the 2001 to 2006 Census period, the pre-school age population (ages 0-3), and elementary school age population (ages 4-13) declined within the Municipality, whereas the secondary school age population (14-17) cohort increased. Between 2006 and 2011 census period all 3 cohorts declined in population per household.

Table 5-1
Municipality of Clarington
Changes to Pre-School and School Age Population, 2001-2011 Census Periods

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.166	0.136	0.129	-0.030	-18.1%	-0.007	-5.1%	0.166	0.136	0.129	-0.030	-18.1%	-0.007	-5.1%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.540	0.454	0.366	-0.085	-15.8%	-0.088	-19.4%	0.540	0.454	0.366	-0.085	-15.8%	-0.088	-19.4%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
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Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

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Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%

Population per Household (Population/Number of occupied household)														
Municipality	Census Periods		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change		2001-2006 Change		2006-2011 Change	
	2001	2006	Absolute Change		Absolute Change		2001	2006	Absolute Change		Absolute Change		2001	2006
			%		%									
Clarington	0.178	0.200	0.186	0.022	12.3%	-0.014	-6.9%	0.17						

5.1.3 Births

According to the Statistics Canada, the total number of children born annually in the Municipality of Clarington increased from 840 in 2007/08 to 925 in 2011/12 as shown in Table 5-2. This represents a 0.1% annual average increase in the number of live births in the Municipality.

Table 5-2
Total number of Births
Municipality of Clarington

	2007/ 2008	2008/ 2009	2009/ 2010	2010/ 2011	2011/ 2012
Total number of births	840	860	905	875	925

Source: StatsCan - Births by census division and sex for the period from July 1 to June 30, based on the Standard Geographical Classification (SGC) 2011, annual (persons)

5.1.4 Migration Patterns

Table 5-3 compares the migration patterns between the International, Interprovincial and Intraprovincial population from mid-2009 to mid-2012, for the Region of Durham (upper tier municipality). As indicated in Table 5-3, total net migration in the Region of Durham has increased over the past five years by 566 persons from 2009 to 2012. The *natural population increase* (difference between the number of births and deaths) has increased by 66 for the same time period.

TABLE 5-3
Region of Durham
Migration Patterns
By Total Population

	2009/ 2010	2010/ 2011	2011/ 2012	2012/ 2013
International	1,369	1,339	1,268	1,355
Interprovincial	-971	-960	-912	-1,265
Intraprovincial	4,966	5,898	4,652	5,840
Total Net Migration	5,364	6,277	5,008	5,930
<i>Natural Increase</i>	<i>2,839</i>	<i>2,949</i>	<i>3,006</i>	<i>2,905</i>

5.1.5 Enrolment Overview

Historical elementary by grade enrolments (2010/11 to 2014/15) for the KPR and for the PVNCC in the Municipality of Clarington have been summarized in Tables 5-4 and 5-7.

Table 5-4 outlines the total by grade elementary enrolment for the Kawartha Pine Ridge DSB within the Municipality of Clarington. Between 2010/11 and 2014/15, the elementary panel has decreased by 2 students.

TABLE 5-4
KAWARTHA PINE RIDGE DSB
Municipality of Clarington, Only
Historical Elementary Enrolment, 2010/11 to 2014/15

KPR Grade	2010 2011	2011 2012	2012 2013	2013 2014	2014 2015
JK	652	658	715	731	744
SK	729	702	707	733	781
1	767	748	740	719	762
2	688	768	742	734	728
3	759	697	783	730	738
4	755	783	706	771	731
5	742	766	787	713	767
6	781	750	768	774	715
7	806	783	750	752	771
8	812	810	792	733	752
Total	7,491	7,465	7,490	7,390	7,489
GSR	0.895	0.900	0.936	0.966	1.022

Historically, for Peterborough Victoria Northumberland and Clarington Catholic DSB the total elementary enrolment has increased from 2,933 in 2010/11 to 3,145 in 2014/15, as shown in Table 5-5. This represents an increase of 212 students or 7.2% on the elementary panel.

TABLE 5-5
PETERBOROUGH NORTHUMBERLAND VICTORIA
AND CLARINGTON CATHOLIC DSB
Municipality of Clarington, Only
Historical Elementary Enrolment, 2010/11 to 2014/15

KPR Grade	2010 2011	2011 2012	2012 2013	2013 2014	2014 2015
JK	245	289	292	294	333
SK	237	251	292	314	303
1	289	245	271	293	321
2	263	299	254	301	307
3	244	269	308	270	314
4	329	251	280	323	279
5	287	330	260	304	334
6	325	290	337	271	320
7	383	336	299	350	288
8	331	390	340	309	346
Total	2,933	2,950	2,933	3,029	3,145
GSR	0.742	0.773	0.876	0.969	1.003

Enrolment at the secondary panel for KPR in the Municipality of Clarington, Table 5-6, has decreased by 1,231 ADE students or 28.9% between 2010/11 and 2014/15. In part, this reflects KPR's historical decline in elementary enrolment negatively impacting on secondary enrolment as a result of smaller graduating elementary classes moving into the secondary school environment.

TABLE 5-6
KAWARTHA PINE RIDGE DSB
Municipality of Clarington, Only
Historical Secondary Enrolment, 2010/11 to 2014/15

KPR Grade	2010 2011	2011 2012	2012 2013	2013 2014	2014 2015
9	845	741	776	711	705
10	893	862	767	761	710
11	1027	902	853	771	760
12	1490	1610	1267	1120	849
Total	4,255	4,115	3,663	3,363	3,024

The same can be shown for Peterborough Victoria Northumberland and Clarington Catholic DSB, Table 5-7 where between 2010/11 to 2014/2015 secondary enrolment has decreased by 155 or 8.3%

TABLE 5-7
PETERBOROUGH NORTHUMBERLAND VICTORIA
AND CLARINGTON CATHOLIC DSB
Municipality of Clarington, Only
Historical Secondary Enrolment, 2010/11 to 2014/15

KPR Grade	2010 2011	2011 2012	2012 2013	2013 2014	2014 2015
9	445	440	434	423	392
10	441	472	424	437	435
11	430	444	446	417	421
12	559	494	498	494	472
Total	1,875	1,850	1,802	1,771	1,720

5.1.6 Grade Structure Ratio (GSR)

In Table 5-4 and 5-5, the change in Grade Structure Ratio (GSR) is shown in each year between 2010/11 and 2014/15. GSR measures the number of pupils entering the elementary system (JK-1) versus the number leaving the elementary system (Grades 6-8). A ratio of 1.0 is indicative of an equal number of pupils entering the system as those leaving the system (i.e., when the information is expressed as average daily enrolment including full-day kindergarten). Further, a ratio of 1.0 in each year is an indicator of stable enrolment, whereas a value less than 1.0 is indicative of a decline in enrolment moving into the secondary panel. Increasing births or net migration, as well as the introduction of programs like full day Kindergarten can alter the GSR.

5.1.7 Apportionment

Tables 5-8 outlines the apportionment between primary elementary and secondary service providers in the Municipality of Clarington (i.e., includes English language public boards and excludes French language schools, home schooling, institutional, instructional settings, etc.).

Table 5-8 illustrates the historic elementary and secondary patterns for KPR and PVNCC in the Municipality of Clarington between 2010/11 and 2014/15 as reported by each school board. Over this time frame, KPR

decreased its elementary panel apportionment share by 1.4%. Similarly, the Board's apportionment share has decreased at the secondary panel over the same timeframe by 5.7%.

Over the same time frame, PVNCC increased its apportionment share by 1.4%. Similarly, the Board's apportionment share has increased at the secondary panel over the same timeframe by 5.7%.

TABLE 5-8
KAWARTHA PINE RIDGE DSB AND PETERBOROUGH NORTHUMBERLAND
VICTORIA AND CLARINGTON CATHOLIC DSB
Apportionment in the Municipality of Clarington

	2010 2011	2011 2012	2012 2013	2013 2014	2014 2015	Change	As %
KPR							
Elementary	7,491	7,465	7,490	7,390	7,489	-2	0.0%
Apportionment	71.9%	71.7%	71.9%	70.9%	70.4%	-1.4%	
Secondary	4,255	4,115	3,663	3,363	3,024	-1,231	-28.9%
Apportionment	69.4%	69.0%	67.0%	65.5%	63.7%	-5.7%	
PVNCC							
Elementary	2,933	2,950	2,933	3,029	3,145	212	7.2%
Apportionment	28.1%	28.3%	28.1%	29.1%	29.6%	1.4%	
Secondary	1,875	1,850	1,802	1,771	1,720	-155	-8.3%
Apportionment	30.6%	31.0%	33.0%	34.5%	36.3%	5.7%	
Total Elementary	10,424	10,415	10,423	10,419	10,634	210	2.0%
Total Secondary	6,130	5,965	5,465	5,134	4,744	-1,386	-22.6%

Source: KPRDSB and PVNCCDSB October 31st student enrolment

5.2 Projections of Pupil Accommodation Needs

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

5.2.1 Methodology

The derivation of by-school and by-grade enrolment projections consists of two distinct methodological elements. The first is based on a retention rate approach to determine how the existing pupils of the Board (i.e., pupils resident in existing housing within the Board's jurisdiction, as well as any pupils who reside outside of the Board's jurisdiction but attending schools of the Board) would move through each grade and

transition from the elementary to the secondary panel -- including changes in apportionment. This element of the enrolment projection methodology is known as the “Requirements of the Existing Community.” The second part of the projection exercise is to determine how many pupils would be generated by new housing development over the forecast period, and what portion of these pupils would potentially choose to attend schools of the Board. This element of the forecasting exercise is known as the “Requirements of New Development.” The EDC Guidelines require that each projection element be examined separately. The methodological approach to each element is examined in depth below.

Requirements of the Existing Community

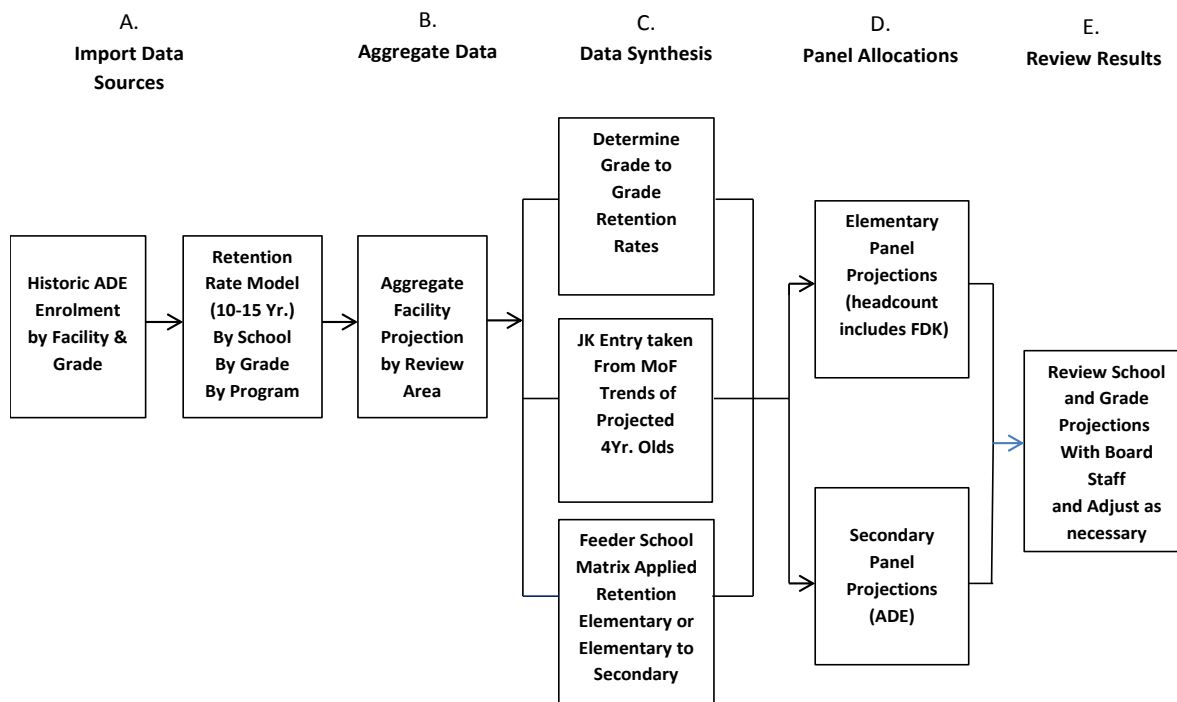
The enrolment projections of the existing community are intended to reflect the predicted change in enrolment pertaining to housing units that have previously been constructed and occupied within the Board’s jurisdiction. This differs from the pupil place requirements of new development, which reflect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

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

1. Enrolment projections disaggregated by sub-geography (i.e., review areas).
2. Historic average daily enrolment by school and by grade. This information is verified against the Board’s Financial Statements. The enrolment summaries are used to determine how changes in the provision of facilities and programs, as well as school choice, have affected student enrolment to date. This information also provides perspectives on how board apportionment has changed throughout the jurisdiction and by sub-area. This information provides an indication of holding situations where pupils are provided with temporary accommodation awaiting the construction of additional pupil spaces.
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?

FIGURE 1

PUPIL REQUIREMENTS OF THE EXISTING COMMUNITY



4. Apportionment by sub-area -- boards are asked to provide several years of data indicating student enrolment by school and by program, based on where pupils reside. This data provides the most accurate assessment of the Boards' apportionment share by sub-geography. There are five (5) education service providers in this jurisdiction (i.e., two English-language, two French-language, plus private school, home school, etc.). The cumulative apportionment share of each service provider must equal 100%.
5. Feeder school retentions for each elementary and secondary school -- this includes pupils feeding into specialized programs (e.g., French Immersion, Extended French, Gifted, etc.) and from elementary schools into secondary schools. The secondary enrolment projections are a direct function of the elementary enrolment projections where Grade 8 pupils feed into secondary schools. Typically Grade 8 students are directed to a preferred secondary school based on a board's attendance boundaries. However, "open access" policies at the secondary level often permit students to attend their school of choice (which could include a co-terminous board's secondary school).

6. Historical enrolment anomalies and the ability to document unusual shifts in enrolment at any individual school due to changes in program, staffing, transportation, policies etc.

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

Requirements of New Development

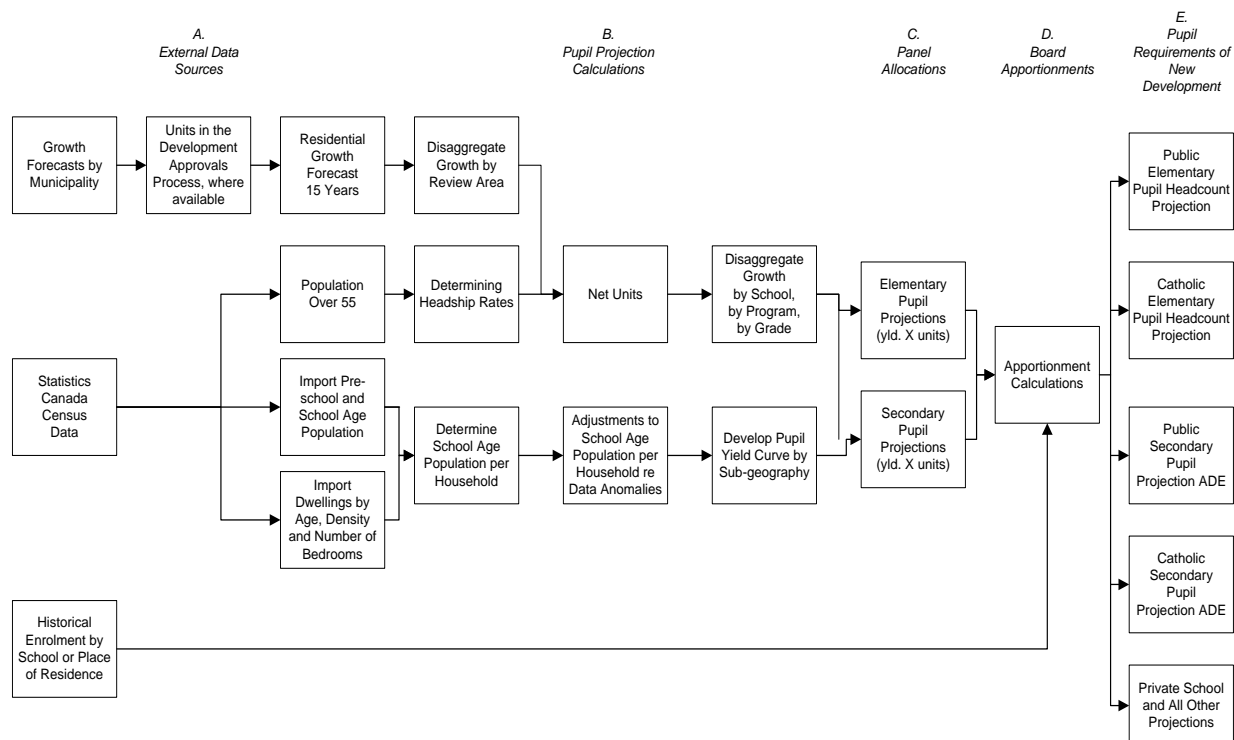
The projected enrolment supporting the “requirements of new development” is intended to determine the number of pupils that would occupy new housing development, and the percentage of these pupils that are likely to attend schools of the Board. Some of these pupils may be held in existing schools of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

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

1. Municipal growth forecast – the Municipality of Clarington was contacted and asked to provide information respecting the most recent council -approved housing and population forecasts, secondary plans, etc., as well as a copy of the relevant approved forecast targets in the Official Plan.
2. Other housing and population forecasts, from the Municipality of Clarington were obtained to help determine the growth forecast at a sub-geography.
3. Both the units in the development approvals process and the 15-year municipal housing forecasts (i.e., by type, where available) are used to determine the number of new dwelling units to be constructed by review area and by school district.
4. The 15-year housing projections typically do not match on an annual basis (i.e., phasing of approved development may differ from projected timing of development). However, they are matched by dwelling unit type and total number of units for each 5-year increment, where feasible, and always match to the 15-year projection totals.

5. The board's MPAC data provides detailed information respecting the number of occupied households and the period constructed, household density, the number of bedrooms. This information is used to with the board's historical student data to determine historic pupil generation factors (i.e., the total number of school-age children occupying a given household unit) by density

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



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

The New Unit Pupil Yield Cycle

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

detached units will represent an amalgamation of units at different points on the pupil yield cycle. It should be noted that new communities are generally comprised of:

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

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

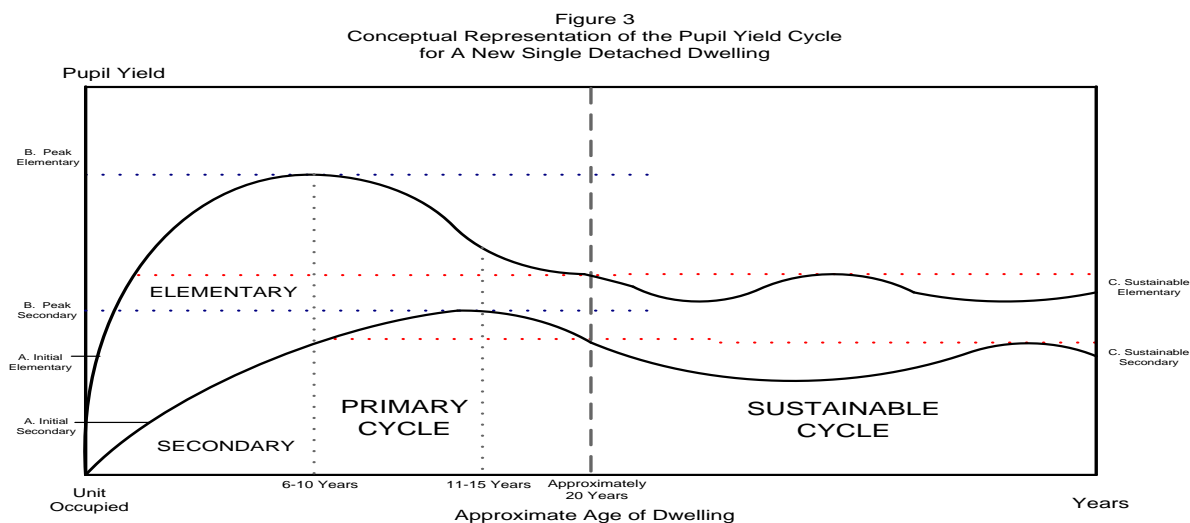
The primary yield cycle for elementary pupil yields in new single detached units generally peaks within the first 7 to 10 years of community development, depending on the timing of occupancy of the units. Recent demographic and occupancy trends, however, suggest that the family creation process is being delayed as many families are postponing having children and also having less children (as witnessed by declining fertility rates). Also, lower mortgage interest rates over the past few years have allowed buyers to purchase homes in advance of the intention to create families.

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

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

Accordingly, the overall blended pupil yield for a single community will incorporate the combination of these factors. Pupil yields applicable to different communities will vary based on these (and other) demographic factors. Pupil generation in the re-occupancy of existing dwelling units can vary from its initial occupancy.

For these reasons, an overall pupil yield generally reflects a weighting (i.e. the proportion of low, medium and high density units constructed each year) and blending of these variables.



Calculation of Pupils Generated from Requirements of New Development

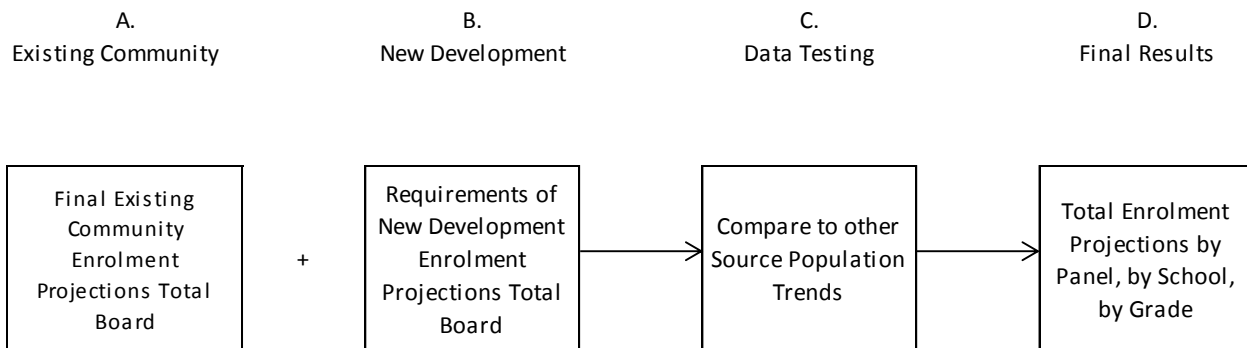
1. Statutorily-exempt units are removed from the gross number of units. The resultant projection of dwelling units is known as the “net units.”
2. Historical enrolment by place of residence is requested from each co-terminous board. This information, along with the board’s MPAC, is used to determine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

Total Student Enrolment Projections

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

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

FIGURE 4



5.2.2 Summary of Board Enrolment Projections

Summaries of the total enrolment for KPR and PVNCC within the Municipality of Clarington are provided in Table 5-9 and 5-10 for the elementary and secondary panels.

The total EDC elementary enrolment projections indicate that by the end of the 15-year forecast period, within the Municipality of Clarington, the KPR will have a total enrolment of 11,235 students for an increase of 3,719 students from the 2014/15 enrolment of 7,516. The Board is expected to experience a decrease of about 261 students in the existing community, which is projected to be offset by an additional 3,979 pupils from new housing development. Similarly, at the secondary panel, KPR forecasts a decrease of 223 students in the existing community and 1,154 additional students to come from new development over the next 15 years. This results in total projected year 15 enrolment of 4,239 students on the secondary panel, an increase of about 931 students from the 2014/15 enrolment.

The total EDC elementary enrolment projections indicate that by the end of the 15-year forecast period, the PVNCC, within the Municipality of Clarington, will have a total enrolment of 5,141 students for an increase of 1,996 students from the 2014/15 enrolment of 3,145. The Board is expected to experience an increase of about 85 students in the existing community, which is projected to be enhanced by an additional 1,911 pupils from new housing development. Similarly, at the secondary panel, the PVNCC forecasts a decrease of 191 students in the existing community and 764 additional students to come from new development over the next

15 years. This results in total projected year 15 enrolment of 2,293 students on the secondary panel, an increase of 573 students from the 2014/15 enrolment.

Table 5-9
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
Historical and Projected Enrolment

	Current 2014/ 2015	Year 1 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Year 6 2020/ 2021	Year 7 2021/ 2022	Year 8 2022/ 2023	Year 9 2023/ 2024	Year 10 2024/ 2025	Year 11 2025/ 2026	Year 12 2026/ 2027	Year 13 2027/ 2028	Year 14 2028/ 2029	Year 15 2029/ 2030
Elementary Panel																
Existing	7,516	7,530	7,513	7,550	7,531	7,540	7,528	7,506	7,493	7,463	7,390	7,335	7,306	7,274	7,256	7,255
Requirement of New Development		182	365	613	860	1,108	1,379	1,651	1,948	2,245	2,543	2,816	3,089	3,386	3,683	3,979
Total	7,516	7,713	7,878	8,163	8,392	8,648	8,908	9,156	9,441	9,708	9,932	10,151	10,395	10,660	10,939	11,235

	Current 2014/ 2015	Year 1 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Year 6 2020/ 2021	Year 7 2021/ 2022	Year 8 2022/ 2023	Year 9 2023/ 2024	Year 10 2024/ 2025	Year 11 2025/ 2026	Year 12 2026/ 2027	Year 13 2027/ 2028	Year 14 2028/ 2029	Year 15 2029/ 2030
Secondary Panel																
Existing	3,308	3,201	3,157	3,112	3,107	3,068	3,008	3,015	3,008	3,066	3,127	3,174	3,184	3,165	3,126	3,085
Requirement of New Development		41	82	137	192	247	317	388	468	549	630	727	823	933	1,044	1,154
Total	3,308	3,242	3,239	3,249	3,299	3,315	3,325	3,403	3,476	3,615	3,757	3,901	4,007	4,098	4,170	4,239

Table 5-10
PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD
Historical and Projected Enrolment

	Current 2014/ 2015	Year 1 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Year 6 2020/ 2021	Year 7 2021/ 2022	Year 8 2022/ 2023	Year 9 2023/ 2024	Year 10 2024/ 2025	Year 11 2025/ 2026	Year 12 2026/ 2027	Year 13 2027/ 2028	Year 14 2028/ 2029	Year 15 2029/ 2030
Elementary Panel																
Existing	3,145	3,164	3,240	3,273	3,285	3,342	3,349	3,347	3,333	3,327	3,280	3,257	3,243	3,230	3,226	3,230
Requirement of New Development		87	173	293	413	532	668	805	953	1,102	1,250	1,378	1,505	1,640	1,775	1,911
Total	3,145	3,251	3,413	3,566	3,698	3,874	4,017	4,152	4,286	4,429	4,530	4,635	4,748	4,870	5,001	5,141

	Current 2014/ 2015	Year 1 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Year 6 2020/ 2021	Year 7 2021/ 2022	Year 8 2022/ 2023	Year 9 2023/ 2024	Year 10 2024/ 2025	Year 11 2025/ 2026	Year 12 2026/ 2027	Year 13 2027/ 2028	Year 14 2028/ 2029	Year 15 2029/ 2030
Secondary Panel																
Existing	1,720	1,657	1,538	1,456	1,442	1,381	1,430	1,441	1,434	1,485	1,535	1,566	1,571	1,587	1,550	1,529
Requirement of New Development		29	57	95	133	172	219	266	319	372	426	488	550	621	692	764
Total	1,720	1,686	1,595	1,551	1,575	1,553	1,649	1,706	1,753	1,857	1,961	2,054	2,122	2,209	2,242	2,293

Chapter 6: SITE REQUIREMENTS AND VALUATION

6.1 Legislative Requirements

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

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

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

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

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

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

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

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

Finally, the Regulation specifies the following site sizes:

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

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

Where school sites are situated adjacent to parkland that is available for school program usage, then the foregoing site size limitations are generally reasonable. However, municipalities may be reluctant to allow shared usage of this land (and many emplace fencing between school sites and parks). In the latter instance, Boards may require site sizes in excess of the maximum prescribed above. In some cases, a portion of the

school site may be undevelopable (e.g. environmentally sensitive lands, woodlots, etc.). Changes to program offering often translate into larger school buildings footprints, increased playfield space, parking spaces, site access, etc. The EDC legislation outlines the circumstances under which the acquisition of school sites may exceed the acreage benchmarks outlined above.

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

6.2 Site Requirements

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

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

The permanent capacity of each new school to be constructed, proposed additions to meet growth-related needs, the number of eligible pupil places to be funded, and associated land needs under the jurisdiction-wide by-law scenario for the Kawartha Pine Ridge District School Board is set out in Chapter 7 and in Chapter 8 for the Peterborough Victoria Northumberland and Clarington Catholic District School Board.

6.3 Site Valuation

Both Boards retained the services of the firm Cushman & Wakefield Ltd. 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.

The purpose of the report was to provide market value update appraisals of the KPR’s and the PVNCC’s future school sites. The appraisal report provides an indication of future anticipated land prices (per acre) in each development community identified by the Boards.

The following is an excerpt from the Cushman & Wakefield Ltd. appraisal report:

With respect to the appraisals, please note the following:

- By agreement, this is a Short Narrative Appraisal Report, which contains a summary of the data, reasoning and analysis upon which our value conclusion is based. This document has been prepared in accordance with the Canadian Uniform Standards of Professional Appraisal Practice (The Standards) as adopted by the Appraisal Institute of Canada.
- It should be noted that this report is “limited” in nature and that it does not contain all the pertinent information used to reach the market value conclusions specifically in keeping with the limited scope of this exercise.
- We have not searched title of the subject properties. Instead, we have accepted the ownership, site areas, site dimensions and legal descriptions for each of the subject properties as represented by the School Board and assumed that the proposed use to be legal and conforming.
- This report assumes that the sites are zoned and serviced for residential development.
- The effective date of these appraisals is March 1, 2015.

A copy of the Cushman & Wakefield Ltd. report is available upon request.

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

Future site acquisitions, where no existing option agreement is in place are costed on the basis of the research undertaken by the Boards’ appraiser. The costs are based on valuation estimates of average acreage rates as of March 1, 2015.

The following table provides a summary of the appraisal results by site for the Board:

Kawartha Pine Ridge District School Board

General Location	Site Reference	Total Site Acreage	Value Per Acre (2015 \$)
Newcastle	Foster North Elementary- Block 595	6.00	\$378,000
Newcastle	North Village Elementary- Block 428	5.81	\$358,000
Courtice	Highland Elementary- Block 62 and 48	5.84	\$403,000
Bowmanville	Northglen Elementary- Block 428	8.33	\$367,000
Bowmanville	Brookhill Elementary- sw Clarington & Longworth	4.94	\$374,000
Newcastle	rural	6.00	\$326,000
Totals		36.92	\$367,000

Peterborough, Victoria, Northumberland, and Clarington Catholic DSB

General Location	Site Reference	Total Site Acreage	Value Per Acre (2015 \$)
Bowmanville	Northglen East- block 300	5.00	\$366,000
Clarington	Brookhill- NW Clarington blvd and Longworth	4.94	\$374,000
Totals		9.94	\$370,000

6.3. Approach

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

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

Any additional land proceeds are to be added to a board's Proceeds of Disposition account and used to fund capital expenditure needs (Section 16.1 of O. Reg 20/98).

The costs are based on valuation estimates of average acreage rates as set out in the March 2015 appraisal report.

6.4 Land Escalation over the Forecast Period

The Appraiser's Report also estimates an annual land escalation rate to be applied to the acreage values in order to sustain the likely site acquisition costs over the next 5 years. In arriving at an escalation factor to be applied to the next 5-year horizon, the Appraisers considered the recent historical general economic conditions and land value trends over the past 10 years. The Appraisers concluded that:

Determining a land value escalation index requires consideration of near-term and longer-term economic indicators at a macro level, along with a micro-level assessment of the local residential real estate market. In a shorter-term projection (five years), the micro-market factors take on greater importance.

We are likely nearing the end of a prolonged period of historically low mortgage interest rates. Undoubtedly, these low rates – combined with extended mortgage amortization periods – have seen an influx in home buying activity. However, there is ongoing uncertainty around the timing of rising rates, given the recent interest rate adjustment made by the Bank of Canada to surprisingly (to many market observers) lower the overnight rate to 0.75%. The Bank Rate is correspondingly 1.0% at present.

Since 2008, the federal government has made several changes to the rules for mortgages insured through the Canada Mortgage and Housing Corporation (CMHC) and other private sector mortgage insurance providers. These rules affect home buyers with less than a 20% down payment, and these changes will impact many first-time home buyers in Canada. Perhaps most notably, the maximum amortization period has been reduced to 25 years from 40 years.

Overall, the combination of a rise in mortgage rates and tighter mortgage lending regulations will eventually act to lessen the rate of growth of house prices – which will directly translate to a moderation of land values for housing development. Taking into account our analysis of interest rates, the consumer price index and policy target, and the local real estate market conditions, in our view, **an annual land value escalation index of 5.0% is recommended** for the 2014-2019 period. This is guided by local housing market conditions which continue to see house price increases above the rate of inflation.

As such, the appraisers recommended an escalation factor of 5% per annum for the purposes of projecting the land values over the five-year by-law period.

6.5 Site Preparation/Development Costs

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

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

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

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

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

The third and final source of financing site preparation/ development costs is education development charges (i.e. for ‘eligible’ school boards). Through discussion with the development community, the boards and the Ministry over time, a sample list (although by no means an exhaustive list) of EDC “eligible” site preparation/ development costs in a greenfields situation has been determined.

6.5.1 Eligible Site Preparation/Development Costs

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

- an agent or commission fee paid to acquire a site or to assist in negotiations to acquire a site;
- costs to fulfill municipal requirements to properly maintain the school site prior to construction of the school facility;

- land appraisal reports and legal fees;
- transportation studies related to site accessibility;
- soils tests;
- environmental studies related to the condition of the school site;
- preliminary site plan/fit studies;
- stormwater management studies related to the site;
- archaeological studies precedent to site plan approval of the site;
- planning studies aimed at ensuring municipal approval of the site plan;
- expropriation costs;
- site option agreement costs;
- rough grading, removal of dirt and rubble, engineered fill;
- removal of buildings on the site;
- land transfer taxes.

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

- site servicing costs;
- temporary or permanent road access to the site;
- power, sanitary, storm and water services to the site;
- off-site services required by the municipality (e.g. sidewalks).

6.5.2 Conclusions on Site Preparation/Development Costs

The Boards concluded that an average of \$70,518 per acre based on experiences by school boards within the Regional Municipality of Durham was reasonable to address site preparation costs.

The average annual change in the Statistics Canada Non-Residential Price Index for Institutional Structures (Toronto Series) is 1.9%. While this average price index change is nominal, given each Board's anticipated site preparation costs over the 15-year period, it is reasonable to apply an escalator of 2% per annum. Site preparation/development costs are escalated annually over the fifteen-year forecast period.

The Form E,F, and Gs of the EDC Submission, set out in Chapter 7 for KPR and in Chapter 8 for PVNCC outline the assumed cost per acre (expressed in 2015 dollars), the assumed total land costs escalated to the year of site acquisition, or the end of the proposed by-law period, whichever is sooner, the site development costs and associated financing costs for each site required to meet the needs of the net growth-related pupil places.

Chapter 7: KAWARTHA PINE RIDGE DSB -- EDC CALCULATION – MUNICIPALITY OF CLARINGTON

The basis for the calculation of the education development charges for the Kawartha Pine Ridge District School Board is documented in the Board's Education Development Charges Submission to the Ministry of Education and found in this Chapter for the Municipality of Clarington.

7.1 Growth Forecast Assumptions

The net education land costs and EDC calculations for the KPR were based on the following forecast of net new dwelling units for the mid-2015 to mid-2030 period, as detailed in Chapter 4 of this report:

RESIDENTIAL:

Net New Units	14,976
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Average units per annum	998
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The forecast of non-residential (includes commercial, industrial and institutional development) building permit value over the mid-2015 to mid-2030 period, as detailed in Chapter 4 of this report, is summarized as follows:

NON-RESIDENTIAL:

Net Gross Floor Area (GFA)	7,180,378 sq.ft.
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Average annual GFA	478,692 sq.ft.
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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) within the municipality and by panel (elementary versus secondary) from new development, as set out in Forms E, F and G included in this Chapter and described in detail in Chapter 5 of this report.

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

**TABLE 7-1: KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD PUPIL YIELDS
BY ELEMENTARY & SECONDARY REVIEW AREA**

Summary of Weighted/Blended Pupil Yields -- Elementary				
Review Area	SINGLES	MEDIUM DENSITY	APARTMENTS	Total
PE01 - Newcastle Elementary	0.3369	0.2326	0.0270	0.2880
PE02 - Courtice Elementary	0.3382	0.2357	0.0270	0.2739
PE03 - Bowmanville Elementary	0.3374	0.2297	0.0270	0.2539
Total	0.3375	0.2315	0.0270	0.2657

Summary of Weighted/Blended Pupil Yields -- Secondary				
Review Area	SINGLES	MEDIUM DENSITY	APARTMENTS	Total
PS01: Municipality of Clarington	0.0960	0.0673	0.0145	0.0770
Total	0.0960	0.0673	0.0145	0.0770

7.3 Determination of Net Growth-Related Pupil Place Requirement

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

1. Determine the requirements of the existing community which is total permanent capacity (net of any leased or non-operational capacity) of all school facilities in each Board's inventory measured against the projected enrolment (i.e. headcount enrolment for the elementary panel and ADE enrolment for the secondary panel) from the existing community at the end of the fifteen-year forecast period. Distinguish between schools and associated existing community enrolment that is, and isn't, available and accessible to accommodate new development.
2. Determine the requirements of new development, which is the number of pupils generated from the dwelling units forecasted to be constructed over the forecast period and the number of pupils generated from new development in previous EDC by-law periods that continues to be temporarily accommodated in existing schools until new school sites are acquired and the schools and/or additions constructed.

3. Determine Net Growth-related Pupil Place Requirements which is the requirements of new development less the number of available pupil places in existing facilities that are available and accessible to new housing development.

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

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

TABLE 7-2

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD Determination of Net Growth-Related Pupil Places				
	Elementary		Secondary	
	Review Area Schools Where There is Little or No Housing Growth:	Review Area Schools Impacted by Housing Growth:	Review Area Schools Where There is Little or No Housing Growth:	Review Area Schools Impacted by Housing Growth:
OTG Capacity	0	8,242	147	3,480
Projected 2029/30 Enrolment (Existing Community)	0	7,255	284	3,085
Requirements of New Development 2029/30 (Headcount Elementary)		3,979		1,154
Less: Available and Accessible Pupil Places on a Review Area Basis		(987)		(395)
# of NGRPP Included in EDC Rate		2,993		759

7.4 Approved Capital Cost Per Pupil

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

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

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

The total net education land costs for the Kawartha Pine Ridge District School Board, including escalation of land over the term of the by-law (five years), site acquisition costs, site development costs, associated financing costs, study costs and outstanding financial obligations are \$17,105,349 to be recovered from 14,976 “net” new residential units and 7,180,378 square feet of non-residential Gross Floor Area.

The Board does not anticipate being in a position to designate 2015-16 operating budget funds for the purpose of acquiring school sites. On February 26, 2015, the Kawartha Pine Ridge District School Board Trustees approved the following resolution:

That the Board approve the following Statement of Review for the Education Development Charge Background Study 2015-2020 regarding any operating budget surplus:

“The Board has reviewed its operating budget for the year ending August 31, 2015 for savings that could be applied to reduce growth-related net education land costs. Such review disclosed that there is no surplus of operating funds available for such capital needs. The Board has therefore determined that the amount of the savings which it proposes to apply to such costs is nil.”

A copy of the Board's policy is found in Appendix C1 of this document.

In addition, the Board has not been presented with any viable alternative accommodation arrangements that would serve to reduce the charge. On February 26, 2015, the Kawartha Pine Ridge District School Board Trustees also approved the following resolution:

That the Board approve the following Statement of Review for the Education Development Charge Background Study 2015-2020, regarding the implementation of Board Policy No. BA-6.9, Alternative Arrangements for School Facilities:

"The Board continues to seek out suitable opportunities for alternative accommodation arrangements in accordance with Board Policy BA-6.9. such as:

- **school sites adjacent to parks are reduced in size (i.e. the future Brookhill Neighbourhood elementary school site in Bowmanville);**
- **school sites shared with municipal buildings, such a community centres, are investigated (i.e. the new Duke of Cambridge Public School was located on a campus of schools shared with a Municipality of Clarington recreation centre);**
- **option to purchase agreements are implemented (i.e. the future Highland Neighbourhood elementary school site in Courtice);**
- **forward-buying (i.e. current negotiations to purchase the Brookhill Neighbourhood elementary school site in Bowmanville and the Foster Neighbourhood elementary school site in Newcastle are underway with projected school openings in 2020 for each school); and**
- **lease buy-backs, site exchanges, joint partnerships and leasing of sites/buildings are considered, but no opportunities have presented themselves in this regard."**

A copy of the Board's policy is also found in Appendix C1 of this document.

EDC Submission (Forms E, F and G)

The following sheets detail, for each elementary and secondary review area:

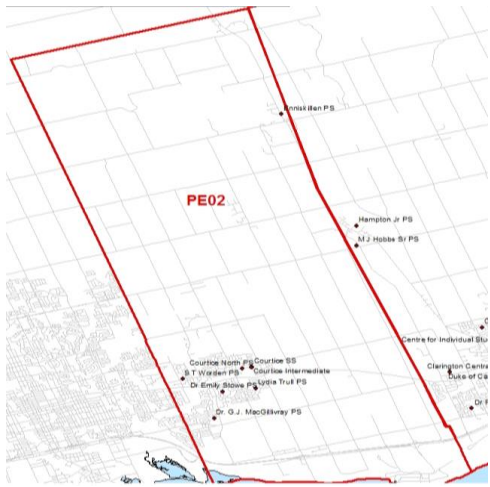
- the cumulative number of forecasted new dwelling units by type;
- the weighted/blended pupil yield by unit type and the number of growth-related pupil places generated by the 15-year housing forecast;
- the existing schools within each review area, the OTG capacity for EDC purposes, distinguished between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

additional growth-related school sites are in the process of being secured or have been identified by the board as a future need);


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

Review Area: PE01 - Newcastle Elementary						Year 1 2015/16	Year 2 2016/2017	Year 3 2017/2018	Year 4 2018/2019	Year 5 2019/2020	Year 6 2020/2021	Year 7 2021/2022	Year 8 2022/2023	Year 9 2023/2024	Year 10 2024/2025	Year 11 2025/2026	Year 12 2026/2027	Year 13 2027/2028	Year 14 2028/2029	Year 15 2029/2030	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																							
Singles						87	87	144	144	144	144	144	182	182	182	182	182	240	240	240	0.3369	2,522	850
Medium Density						23	23	23	23	23	23	23	22	22	22	22	22	19	19	19	0.2326	327	76
High Density						8	8	21	21	21	21	21	33	33	33	33	33	39	39	39	0.0270	404	11
Total Gross Dwelling Units						118	118	188	188	188	188	188	237	237	237	237	237	297	297	297	0.2880	3,252	936
Requirements of Existing Community:																							
Review Area Schools	OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30	Year 15 ROND			Number of Temp. Facilities		
Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0					0	
Total Available Pupil Spaces to Accommodate Growth		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-					
Review Area Schools Impacted by Housing Growth:	OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities			
Kirby Centennial PS	164	98	93	88	83	86	89	90	89	87	86	84	83	83	82	81	81			0			
Newcastle PS	554	605	612	615	629	626	632	622	606	599	591	582	573	565	557	550	547			2			
Orono PS	176	124	136	134	134	135	137	138	139	136	134	132	129	127	125	123	122			0			
The Pines Sr PS	251	214	195	188	193	186	181	185	204	205	205	206	206	204	201	200	198			0			
Totals	1,145	1,041	1,036	1,025	1,040	1,033	1,039	1,035	1,038	1,027	1,015	1,004	991	978									

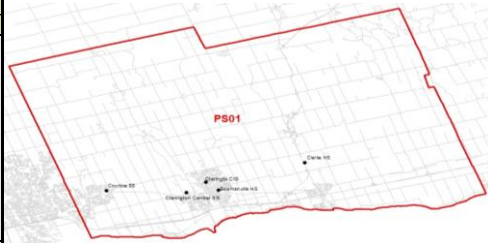
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD - Forms E, F and G
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2015

Review Area: PE02 - Courtice Elementary				Year 1 2015/16	Year 2 2016/2017	Year 3 2017/2018	Year 4 2018/2019	Year 5 2019/2020	Year 6 2020/2021	Year 7 2021/2022	Year 8 2022/2023	Year 9 2023/2024	Year 10 2024/2025	Year 11 2025/2026	Year 12 2026/2027	Year 13 2027/2028	Year 14 2028/2029	Year 15 2029/2030	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils	
Projected Housing Growth																						
Singles				169	169	178	178	178	178	178	124	124	124	124	124	125	125	125	0.3382	2,221	751	
Medium Density				45	45	42	42	42	42	42	36	36	36	36	36	37	37	37	0.2357	590	139	
High Density				8	8	21	21	21	21	21	43	43	43	43	43	50	50	50	0.0270	487	13	
A	Total Gross Dwelling Units			222	222	241	241	241	241	241	203	203	203	203	203	211	211	211	0.2739	3,297	903	
Requirements of Existing Community:																						
B	Review Area Schools			OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30	Year 15 ROND	Number of Temp. Facilities
B1																						
B2																						
B3																						
B4																						
B5																						
B6																						
B7																						
B8																						
B9																						
B10																						
B11																						
B12																						
B13																						
B14																						
B15																						
B16																						
B17																						
Totals				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		0	
Total Available Pupil Spaces to Accommodate Growth						-	-	-	-	-	-	-	-	-	-	-	-	-	-			
C	Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30		Number of Temp. Facilities
C1	Courtice Intermediate School			115	171	188	222	224	215	206	185	179	211	242	237	234	229	222	217	212		2
C2	Courtice North PS			353	400	398	391	389	388	385	388	396	393	387	384	380	376	373	372	374		4
C3	Dr Emily Stowe P S			422	337	329	330	324	326	324	319	323	320	318	311	307	303	301	301	303		0
C4	Dr. G.J. MacGillivray PS			795	799	778	739	714	680	661	644	627	614	602	592	583	578	578	580	588		0
C5	Enniskillen PS			219	178	183	181	177	179	181	177	174	170	167	164	162	160	159	160	162		0
C6	Lydia Trull P S			469	367	349	339	332	327	322	324	321	313	314	315	311	307	305	305	306		0
C7	S T Worden PS			277	212	219	221	229	234	247	248	249	249	247	244	241	238	237	236	237	0	0
C8																						
Totals				2,650	2,464	2,443	2,422	2,389	2,349	2,325	2,286	2,269	2,270	2,278	2,246	2,216	2,190	2,175	2,171	2,181		6
Total Available Pupil Spaces to Accommodate Growth						207	228	261	301	325	364	381	380	372	404	434	460	475	479	469	2650	
D	Requirements of New Development for High Growth Areas (Cumulative):					66	132	200	269	338	415	491	550	609	667	716	765	811	857	903		
E	Less: Available Pupil Places to Accommodate Growth					-207	-228	-261	-301	-325	-364	-381	-380	-372	-404	-434	-460	-475	-479	-469		
F	Equals: Net growth-related Pupil Place Requirements					0	0	0	0	12	50	110	170	236	263	282	305	336	378	434		
Description of Growth-related Need:																						
The # of acres required is based on the site location and lot size identified in the approved plan of subdivision.																						
Growth-related Net Education Lands Costs				Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs				
1	Description of Growth-related Site Acquisition Needs:			TBD	2026	434	450	96.5%	5.84	5.6	\$403,000	\$2,272,216	\$397,598	\$627,771	\$116,738		\$164,559	\$3,578,882				
2																						
3																						
4																						
5																						

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD - Forms E, F and G
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2015

Review Area: PE03 - Bowmanville Elementary				Year 1 2015/16	Year 2 2016/2017	Year 3 2017/2018	Year 4 2018/2019	Year 5 2019/2020	Year 6 2020/2021	Year 7 2021/2022	Year 8 2022/2023	Year 9 2023/2024	Year 10 2024/2025	Year 11 2025/2026	Year 12 2026/2027	Year 13 2027/2028	Year 14 2028/2029	Year 15 2029/2030	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																					
	Singles			202	202	318	318	318	318	318	372	372	372	372	372	411	411	411	0.3374	5,085	1,715
	Medium Density			73	73	101	101	101	101	101	123	123	123	123	123	128	128	128	0.2297	1,649	379
	High Density			110	110	85	85	85	85	85	124	124	124	124	124	143	143	143	0.0270	1,695	46
A	Total Gross Dwelling Units			385	385	504	504	504	504	504	619	619	619	619	619	681	681	681	0.2539	8,428	2,140
Requirements of Existing Community:																					
B	Review Area Schools	OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30	Year 15 ROND		Number of Temp. Facilities
B1																					
B2																					
B3																					
B4																					
B5																					
B6																					
B7																					
B8																					
B9																					
B10																					
B11																					
B12																					
B13																					
B14																					
B15																					
B16																					
B17																					
	Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		0	
	Total Available Pupil Spaces to Accommodate Growth			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-			
C	Review Area Schools Impacted by Housing Growth:	OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities
C1	Central PS	234	188	195	196	197	199	204	196	196	195	194	195	196	198	198	199	199		0	
C2	Charles Bowman PS	686	653	696	738	777	808	841	871	883	874	880	874	874	876	875	875	875		0	
C3	Dr Ross Tilley PS	456	492	496	491	486	485	492	487	476	479	473	469	462	463	462	461	461		2	
C4	Duke of Cambridge P.S.	703	680	709	712	718	719	700	689	669	668	659	654	652	653	654	655	656		0	
C5	Hampton Jr PS	144	132	143	155	172	173	168	165	163	161	160	160	162	164	165	165	165		1	
C6	Harold Longworth PS	585	493	494	505	521	538	557	572	578	593	589	588	588	590	590	590	590		0	
C7	John M. James PS	504	421	403	376	375	353	344	337	326	313	311	308	307	308	307	306	305		0	
C8	M J Hobbs Sr PS	308	194	184	174	179	181	182	198	214	231	232	225	221	218	215	213	211		0	
C9	Vincent Massey PS	395	381	366	360	352	356	350	362	362	343	344	340	339	339	339	339	338		0	
C10	Waverley PS	432	377	367	361	345	338	339	332	332	338	330	328	327	328	327	327	326		0	
	Totals	4,447	4,011	4,051	4,066	4,121	4,149	4,176	4,208	4,199	4,196	4,170	4,140	4,128	4,138	4,134	4,131	4,127			
	Total Available Pupil Spaces to Accommodate Growth			396	381	326	298	271	239	248	251	277	307	319	309	313	316	320		3	
D	Requirements of New Development for High Growth Areas (Cumulative):			84	167	294	421	548	686	823	990	1,157	1,324	1,481	1,638	1,805	1,973	2,140			
E	Less: Available Pupil Places to Accommodate Growth			-396	-381	-326	-298	-271	-239	-248	-251	-277	-307	-319	-309	-313	-316	-320			
F	Equals: Net growth-related Pupil Place Requirements			0	0	0	123	277	447	575	739	880	1,017	1,162	1,329	1,492	1,657	1,820			
Description of Growth-related Need:																					
	Growth-related Net Education Lands Costs	Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs					
	Description of Growth-related Site Acquisition Needs:																				
1	Northglen Elementary- Block 428	TBD	2017	610	600	100.0%	6.00	6.0	\$367,000	\$2,202,000	\$423,108	\$225,705	\$34,878		\$139,081	\$3,024,772					
2	Brookhill Elementary- sw Clarington & Longworth	TBD	2021	610	600	100.0%	6.00	6.0	\$374,000	\$2,244,000	\$423,108	\$619,976	\$72,630		\$161,927	\$3,521,641					
3	New Unnamed Bowmanville Elem #3	TBD	2023	600	600	100.0%	6.00	6.0	\$366,000	\$2,196,000	\$423,108	\$606,714	\$92,658		\$159,940	\$3,478,420					
4																					
5																					

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD - Forms E, F and G
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2015

Review Area: PS01: Municipality of Clarington					Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30	Weighted/Blended Secondary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																						
	Singles				457	457	640	640	640	640	640	678	678	678	678	678	775	775	775	0.0960	9,827	944
	Medium Density				141	141	166	166	166	166	166	181	181	181	181	181	183	183	183	0.0673	2,565	173
	High Density				126	126	127	127	127	127	127	200	200	200	200	200	232	233	233	0.0145	2,585	37
A	Total Gross Dwelling Units				724	724	933	933	933	933	933	1,059	1,059	1,059	1,059	1,059	1,189	1,190	1,190	0.0770	14,976	1,154
Requirements of Existing Community:																						
Review Area Schools With Limited Impact From New Development			OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities
B1																						
B2																						
B3																						
B4																						
B5	Clarington C.I.S.		147	284	284	284	284	284	284	284	284	284	284	284	284	284	284	284	284			2
B6																						
B7																						
B8																						
B9																						
B10																						
B11																						
B12																						
B13																						
B14																						
B15																						
Totals			147	284	284	284	284	284	284	284	284	284	284	284	284	284	284	284	284			2
Total Available Pupil Spaces to Accommodate Growth																						
Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities
C1	Bowmanville HS		903	1126	1081	1077	1071	1037	1051	1035	1084	1137	1164	1221	1227	1206	1207	1190	1180			9
C2	Clarington Central SS		1104	907	809	781	742	703	675	646	628	592	619	633	653	689	677	664	649			3
C3	Clarke HS		576	383	380	374	344	357	345	332	330	342	345	359	357	353	350	346				0
C4	Courtice SS		750	608	648	641	672	725	714	712	687	666	657	643	652	648	644	638	625			4
C5	Clarington C.I.S.		147	284	284	284	284	284	284	284	284	284	284	284	284	284	284	284	284			2
C6																						
C7																						
C8																						
Totals			3,480	3,308	3,201	3,157	3,112	3,107	3,068	3,008	3,015	3,008	3,066	3,127	3,174	3,184	3,165	3,126	3,085			
Total Available Pupil Spaces to Accommodate Growth					279	323	368	373	412	472	465	473	414	354	306	297	315	354	395	3480	0	18
Requirements of New Development for High Growth Areas (Cumulative):					41	82	137	192	247	317	388	468	549	630	727	823	933	1,044	1,154			
E Less: Available Pupil Places to Accommodate Growth					-279	-323	-368	-373	-412	-472	-465	-473	-414	-354	-306	-297	-315	-354	-395			
F Equals: Net growth-related Pupil Place Requirements					0	0	0	0	0	0	0	0	135	277	421	527	618	690	759			
Description of Growth-related Need:																						
Site size is oversized based on the Board's standard of 15 acres for secondary schools and possible additional municipal and environmental requirements.																						
Growth-related Net Education Lands Costs			Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs					
1	New Grady Secondary School		Acquired	2015	759	750	100.00%	9.5	9.5			\$669,921		\$27,065		\$33,592	\$730,578					
2																						
3																						

7.6 EDC Accounts

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

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

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

Table 7-3 summarizes the EDC account collections to August 2014 for the Kawartha Pine Ridge District School Board. The collections cover the period which corresponds to implementation of the existing 2010 EDC by-law to the aforementioned reconciliation date and includes collections from residential development, as well as any proceeds from the disposition of surplus properties (i.e., to the extent that the disposed of site was previously funded through education development charges), any interest earned on the account to date, any interest expense on account deficits to date and any refunds or overpayments during this time period.

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

Table 7-4 calculates the “estimated” EDC account balance as of June 30, 2015 which is the day before the in-force date of the proposed by-law. The estimate of revenue for the September 1, 2014 to June 30, 2015 is based on the estimated monthly collections data for this time period.

Table 7-4 also determines the eligible EDC expenditures for the Board and details site acquisition costs, “net” site preparation and development costs, study costs, and interest costs. Finally, the portion of the expenditures eligible to be funded through education development charges is shown and a cumulative EDC account balance is determined. For KPR, there is an account deficit in the order of \$1,930,833. It is noted

that any additional costs related to these EDC eligible sites, and expended after the account reconciliation undertaken as of April 17, 2015, will be included in the reconciliation of the next EDC by-law.

TABLE 7-3
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
ACCOUNT RECONCILIATION – REVENUE
EDC Collection Period – July 5, 2010 to June 30, 2015

	Column 1	2	3	4	5	6	7
	Collections by Year	EDC's from Residential Development	EDC's from Non-Residential Development	Revenue from Disposition of Property Previously Funded Through EDCs	Plus: Interest Earned	Less: Refunds and Overpayments/ Adjustments including Interest	Net Collections
1	2010-11	\$704,946	\$46,907	\$142,803			\$894,656
2	2011-12	\$713,623	\$108,709		\$9,637	-\$994	\$830,975
3	2012-13	\$406,546	\$31,649		\$18,068		\$456,263
4	2013-14	\$605,346	\$63,214		\$24,091		\$692,651
	Total Revenues						\$2,874,545

TABLE 7-4
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
EDUCATION DEVELOPMENT CHARGE BY-LAW
EDC Account Reconciliation - Revenues less Expenditures
EDC By-law Period - July 5, 2010 to June 30, 2015 (Date before Proposed By-law Implementation Date)

1	Estimated EDC Account Balance as at July 5, 2010										-\$767,836
2	Collections : EDC Account Net Collections as at August 31, 2014 (including Accrued Interest)										\$2,874,545
3	Estimated EDC Account Collections September 1, 2009 to August 31, 2010 (including Accrued Interest)										\$400,000
4	Actual EDC Account Collections September 1, 2009 to August 31, 2010 (including Accrued Interest)										\$2,174,357
5	Adjustment to reflect Actual EDC Account Collections 2009-10 (including Accrued Interest)										\$1,774,357
6	Estimated EDC Account Collections September 1, 2014 to June 30, 2015										\$ 479,330
7	Total Estimated EDC Account Collections at Proposed By-law Implementation										\$4,360,406
EDC Expenditure to Date:											
	Expenditures	Year Site Acquired	Site Size in acres	Site Acquisition Costs	Site Preparation Costs	Total Costs incurred	Costs Funded under a Previous EDC By-law	Non- Growth Related Share of Expenditure	Growth-related Share of Expenditure	Eligible to be financed from Existing EDC Account	EDC Account Balance
	John M. James				\$452,601	\$452,601		0.0%	100.0%	\$452,601	\$3,907,805
	Dr. G.J. MacGillivray				\$365,299	\$365,299		0.0%	100.0%	\$365,299	\$3,542,506
	Harold Longworth				\$27,123	\$27,123		0.0%	100.0%	\$27,123	\$3,515,383
	Clarington Central				\$560,328	\$560,328		0.0%	100.0%	\$560,328	\$2,955,055
	Newcastle Environmental Assessment				\$5,000	\$5,000		0.0%	100.0%	\$5,000	\$2,950,055
	Grady Street Elementary			\$2,083,200		\$2,083,200		0.0%	100.0%	\$2,083,200	\$866,855
	Grady Street Secondary			\$2,473,800		\$2,473,800		0.0%	100.0%	\$2,473,800	-\$1,606,945
	Study Costs									\$317,432	-\$1,924,377
	Interest Costs									\$6,456	-\$1,930,833
	Totals			\$4,557,000	\$1,410,351	\$5,967,351	\$ -			\$6,291,239	-\$1,930,833
Estimated EDC Account Surplus (Deficit) as at Proposed By-law Implementation											
-\$1,930,833											

7.7 Cash Flow Analysis and Forms H1 and H2

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

The quantum of the charge is determined on the basis of a 100% residential share, for the Board. As well, a sensitivity analysis is provided, for various non-residential ratios ranging between 0% and 40%.

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

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

Cash Flow Assumptions:

- site acquisition costs are assumed to escalate by 5.0%;
- site development costs are assumed to escalate at 2% per annum;
- site acquisition costs are inflated only over the term of the by-law period (five years); site development costs escalate over the full fifteen year forecast period;
- the Education Development Charge account accrues 1.65% interest earnings per annum;
- all interim financing is assumed to be undertaken on a short term basis for a five-year term at a cost of 2.98%.

Scenario Comments:
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD BOTH PANELS

Cashflow Assumptions	
A. EDC Account interest earnings (per annum):	1.65%
B. L/T Debenture Rate	3.98%
C. S/T Borrowing Rate	2.98%
D. L/T Debenture Term (years)	10
E. S/T Borrowing Term (years)	5

TABLE 7-5
KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
Cashflow Analysis for Both Panels (Total Jurisdiction)
Current (2015) \$

Form H2					
Type of Development (Form B/C)	Net New Units	Total ROND	Distribution Factor	Net Education Land Cost by Development Type	Differentiated Residential EDC Per Unit
Low Density	9,827	4,260	83%	\$ 12,775,699	\$ 1,300
Medium Density	2,565	766	15%	\$ 2,297,702	\$ 896
High Density	2,585	107	2%	\$ 321,413	\$ 124

Sensitivity Analysis		
Non-res Share	Res Rate	Non-Res Rate
0%	\$1,142	\$0.00
5%	\$1,085	\$0.12
10%	\$1,028	\$0.24
15%	\$971	\$0.36
20%	\$914	\$0.48
25%	\$857	\$0.60
40%	\$685	\$0.95

	Previously Financed 2010 By-law	Year 1 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Year 6 2020/ 2021	Year 7 2021/ 2022	Year 8 2022/ 2023	Year 9 2023/ 2024	Year 10 2024/ 2025	Year 11 2025/ 2026	Year 12 2026/ 2027	Year 13 2027/ 2028	Year 14 2028/ 2029	Year 15 2029/ 2030
Revenues:																
1 Alternative Accommodation Arrangements		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2 Operating Budget Surplus		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3 Assumed Debenture Financing		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4 S/T Borrowing Requirement		\$0	\$0	\$2,080,000	\$0	\$0	\$0	\$1,670,000	\$0	\$2,070,000	\$0	\$0	\$2,330,000	\$0	\$0	\$0
5 Subtotal (1 through 4)		\$0	\$0	\$2,080,000	\$0	\$0	\$0	\$1,670,000	\$0	\$2,070,000	\$0	\$0	\$2,330,000	\$0	\$0	\$0
6 EDC Revenue (Residential) 1,028 per unit		\$743,758	\$743,758	\$959,124	\$959,124	\$959,124	\$959,124	\$959,124	\$1,088,652	\$1,088,652	\$1,088,652	\$1,088,652	\$1,088,652	\$1,222,292	\$1,223,063	\$1,223,063
7 EDC Revenue (Non-residential) 0.24 per sq.ft		\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036	\$114,036
8 Subtotal EDC Revenue (6 + 7)		\$857,794	\$857,794	\$1,073,160	\$1,073,160	\$1,073,160	\$1,073,160	\$1,073,160	\$1,202,688	\$1,202,688	\$1,202,688	\$1,202,688	\$1,202,688	\$1,336,328	\$1,337,099	\$1,337,099
9 Total Revenue (5 + 8)		\$857,794	\$857,794	\$3,153,160	\$1,073,160	\$1,073,160	\$1,073,160	\$2,743,160	\$1,202,688	\$3,272,688	\$1,202,688	\$1,202,688	\$3,532,688	\$1,336,328	\$1,337,099	\$1,337,099
Expenditures:																
10 Site acquisition costs (escalated 5% per annum for 5 years)		\$0	\$0	\$2,427,705	\$0	\$0	\$0	\$2,863,976	\$0	\$2,802,714	\$0	\$0	\$2,899,987	\$0	\$0	\$0
11 Site preparation costs (escalated at 2% per annum to date of acquisition) ²		\$0	\$0	\$1,283,921	\$0	\$457,986	\$0	\$0	\$0	\$495,738	\$0	\$515,766	\$0	\$0	\$514,336	\$0
12 Deficit Recovery		\$386,167	\$386,167	\$386,167	\$386,167	\$386,167										
13 Study Costs		\$0					\$75,000					\$75,000				\$75,000
14 Debenture Carrying Costs		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
15 Short Term Borrowing Costs		\$0	\$0	\$0	\$453,918	\$453,918	\$453,918	\$453,918	\$818,362	\$364,444	\$816,180	\$816,180	\$816,180	\$960,212	\$960,212	\$508,476
16 Total Expenditures (10 through 15)	\$0	\$386,167	\$386,167	\$4,097,793	\$840,085	\$1,298,071	\$528,918	\$3,317,894	\$818,362	\$3,662,896	\$816,180	\$1,406,946	\$3,716,167	\$960,212	\$1,474,548	\$583,476
Cashflow Analysis:																
17 Revenues Minus Expenditures (9 - 16)		\$471,627	\$471,627	-\$944,633	\$233,075	-\$224,911	\$544,241	-\$574,735	\$384,326	-\$390,208	\$386,508	-\$204,258	-\$183,479	\$376,116	-\$137,449	\$753,623
18 Opening Balance	\$0	\$0	\$471,627	\$958,818	\$14,419	\$251,577	\$27,106	\$580,775	\$6,140	\$396,908	\$6,810	\$399,808	\$198,776	\$15,550	\$398,128	\$264,981
19 Sub total (17 + 18)	\$0	\$471,627	\$943,254	\$14,185	\$247,494	\$26,666	\$571,347	\$6,040	\$390,465	\$6,700	\$393,318	\$195,550	\$15,297	\$391,666	\$260,679	\$1,018,604
20 Interest Earnings (12 months on Sub-total)		\$0	\$15,564	\$234	\$4,084	\$440	\$9,427	\$100	\$6,443	\$111	\$6,490	\$3,227	\$252	\$6,462	\$4,301	\$16,807
21 Closing Balance ³ (19 + 20)	\$0	\$471,627	\$958,818	\$14,419	\$251,577	\$27,106	\$580,775	\$6,140	\$396,908	\$6,810	\$399,808	\$198,776	\$15,550	\$398,128	\$264,981	\$1,035,411

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

Total L/T debt issued: \$0
Total short term borrowing: \$8,150,000
Total debenture payments (current \$): \$8,892,868
Residual debt payment as of end of forecast period: \$1,016,951
Year in which outstanding debt is fully funded: 2031

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
Form H1 - EDC Calculation - Uniform Residential and Non-Residential

Determination of Total Growth-Related Net Education Land Costs

Total:	Education Land Costs (Form G)	\$	14,949,516
Add:	EDC Financial Obligations (Form A2)	\$	1,930,833
Subtotal:	Net Education Land Costs	\$	16,880,349
Less:	Operating Budget Savings	\$	-
	Positive EDC Account Balance	\$	-
Subtotal:	Growth-Related Net Education Land Costs	\$	16,880,349
Add:	EDC Study Costs	\$	225,000
Total:	Growth-Related Net Education Land Costs	\$	17,105,349

Apportionment of Total Growth-Related Net Education Land Costs

Total Growth-Related Net Education Land Costs to be Attributed to Non-Residential Development (Maximum 40%)	10%	\$	1,710,535
Total Growth-Related Net Education Land Costs to be Attributed to Residential Development	90%	\$	15,394,814

Calculation of Uniform Residential Charge

Residential Growth-Related Net Education Land Costs	\$	15,394,814
Net New Dwelling Units (Form C)		14,976
Uniform Residential EDC per Dwelling Unit	\$	1,028

Calculation of Non-Residential Charge - Use Either Board Determined GFA or Declared Value

Non-Residential Growth-Related Net Education Land Costs	\$	1,710,535
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GFA Method:	Non-Exempt Board-Determined GFA (Form D)	7,180,378
	Non-Residential EDC per Square Foot of GFA	\$ 0.24

Explanation of the Cash Flow Analysis:

A. Revenues

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

B. Expenditures

- Line 10 brings forward into the calculation the annual site acquisition costs. The timing of the capital expenditures generally determines the point at which the escalation factor of 5.0% per annum is applied.
- Line 11 incorporates the site preparation/development costs, and escalates these costs at 2% per annum.
- Line 12 calculates the expected recovery, if applicable, of the current deficit, distributed equally over the first 5 years of the forecast period.
- Line 13 incorporates the study costs specified under section 257.53(2) at the beginning of each new by-law period, and over the 15-year forecast period.
- Line 14 calculates the debenture carrying costs where longer term financing is appropriate. A 3.98% interest rate is assumed over the 10 year financing period. Interest is accrued beginning in the year following the issuance of the debt.

- Line 15 calculates the short term borrowing costs. An interest rate of 2.98% has been assumed over a five year term of borrowing. These borrowing costs include the repayment of the principal and interest
- Line 16 calculates total anticipated expenditures by totaling Lines 10 through 15.

C. Cash Flow Analysis

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

7.8 Non-Residential Share

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

The attribution of 90% of the net education capital costs to residential development and 10% to non-residential development to determine the education development charge per residential unit and per square foot of Gross Floor Area was based on the residential/non-residential share underlying the Board’s existing EDC by-law (i.e., 90% residential and 10% non-residential share). However, it is noted that the determination of the EDC charge based on any assumed share of non-statutory exempt residential development over the term of the by-law, and any proportionate share from non-residential (industrial, institutional and commercial) development, does not prejudice the Board’s final policy decision on this matter.

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

7.9 Education Development Charges

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

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

TABLE 7-6 KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD CALCULATION OF RESIDENTIAL EDUCATION DEVELOPMENT CHARGE	
Total Growth-Related Net Education Land Costs (over 15-year forecast period including associated financing and study costs)	\$ 17,105,349
Costs Financed in the Previous 2010 By-law	\$ -
Site Acquisition Costs	\$ 8,914,216
Land Escalation Costs	\$ 2,080,166
Site Preparation Costs	\$ 2,900,987
Site Preparation Escalation Costs	\$ 366,760
Debenture Interest Payments	\$ -
Short Term Debt Interest Payments	\$ 687,387
Study Costs	\$ 225,000
Financial Obligations/Surplus (projected EDC Account Balance as of July 5, 2015)	\$ 1,930,833
Interest Earnings	\$ 73,941
Closing Account Balance ¹	\$ 1,035,411
Total Net New Units	14,976
Total Non-Residential, Non-Exempt Board-Determined GFA	7,180,378
Residential Education Development Charge Per Unit based on 100% of Total Growth-Related Net Education Land Costs	\$ 1,028
Non-Residential Education Development Charge Per Sq. Ft. of GFA based on 0% of Total Growth-Related Net Education Land Costs	\$ 0.24

[1] Reflects the EDC account balance in Year 15 (2029/30) which would be required to fund the residual debt requirement of \$1,016,951 for the Board.

Chapter 8: PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD -- EDC CALCULATION

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

8.1 Growth Forecast Assumptions

The net education land costs and EDC calculations for the PVNCC were based on the following forecast of net new dwelling units for the mid-2015 to mid-2030 period, as detailed in Chapter 4 of this report:

RESIDENTIAL:

Net New Units	14,976
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Average units per annum	998
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The forecast of non-residential (includes commercial, industrial and institutional development) building permit value over the mid-2015 to mid-2030 period, as detailed in Chapter 4 of this report, is summarized as follows:

NON-RESIDENTIAL:

Net Gross Floor Area (GFA)	7,180,378 sq.ft.
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Average annual GFA	478,692 sq.ft.
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8.2 EDC Pupil Yields

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

Table 8-1 sets out the EDC pupil yields utilized to determine the number of pupils generated from new development and the yields attributable to the PVNCC based on historical apportionment shares.

TABLE 8-1: PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD PUPIL YIELDS BY ELEMENTARY & SECONDARY REVIEW AREA

Summary of Weighted/Blended Pupil Yields -- Elementary				
Review Area	SINGLES	MEDIUM DENSITY	APARTMENTS	Total
CE01 - Newcastle Elementary	0.1738	0.0788	0.0050	0.1433
CE02 - Courtice Elementary	0.1734	0.0757	0.0048	0.1310
CE03 - Bowmanville Elementary	0.1739	0.0728	0.0051	0.1202
Total	0.1738	0.0742	0.0050	0.1276

Summary of Weighted/Blended Pupil Yields -- Secondary				
Review Area	SINGLES	MEDIUM DENSITY	APARTMENTS	Total
CS01: Municipality of Clarington	0.0685	0.0304	0.0049	0.0510
Total	0.0685	0.0304	0.0049	0.0510

8.3 Determination of Net Growth-Related Pupil Place Requirement

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

1. Determine the requirements of the existing community which is total permanent capacity (net of any leased or non-operational capacity) of all school facilities in each Board's inventory measured against the projected enrolment (i.e. headcount enrolment for the elementary panel and ADE enrolment for the secondary panel) from the existing community at the end of the fifteen-year forecast period. Distinguish between schools and associated existing community enrolment that is, and isn't, available and accessible to accommodate new development.
2. Determine the requirements of new development, which is the number of pupils generated from the dwelling units forecasted to be constructed over the forecast period and the number of pupils generated from new development in previous EDC by-law periods that continues to be temporarily

accommodated in existing schools until new school sites are acquired and the schools and/or additions constructed.

3. Determine Net Growth-related Pupil Place Requirements which is the requirements of new development less the number of available pupil places in existing facilities that are available and accessible to new housing development.

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

Table 8-2 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 Peterborough Victoria Northumberland and Clarington Catholic District School Board.

TABLE 8-2

PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD Determination of Net Growth-Related Pupil Places		
	Elementary Review Area Schools Impacted by Housing Growth:	Secondary Review Area Schools Impacted by Housing Growth:
OTG Capacity	3,458	1,839
Projected 2029/30 Enrolment (Existing Community)	3,230	1,529
Requirements of New Development 2029/30 (Headcount Elementary)	1,911	764
Less: Available and Accessible Pupil Places on a Review Area Basis	(437)	(310)
# of NGRPP Included in EDC Rate	1,395	454

8.4 Approved Capital Cost Per Pupil

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

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

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

The total net education land costs for the Peterborough Victoria Northumberland and Clarington Catholic District School Board, including escalation of land over the term of the by-law (five years), site acquisition costs, site development costs, associated financing costs, study costs and outstanding financial obligations are \$11,814,006 to be recovered from 14,976 “net” new residential units and 7,180,378 square feet of non-residential Gross Floor Area.

The Board does not anticipate being in a position to designate 2015-16 operating budget funds for the purpose of acquiring school sites. On February 24, 2015, the Peterborough Victoria Northumberland and Clarington Catholic District School Board Trustees approved the following resolution:

(1) Education Development Charge Policy Review

Mover: L. Ainsworth Second: D. Demers

that the Board designate \$NIL the amount of surplus non-classroom operating funds that are available for the purpose of acquiring growth-related school sites by purchase, lease or otherwise in conjunction with the requirements of the Policy 105 entitled, 'School Sites-Operating Budget Surplus'.

In addition, the Board has not been presented with any viable alternative accommodation arrangements that would serve to reduce the charge but would be open to any such instances should they arise. At the February 24, 2015 meeting, the Board approved the following resolution:

(2) Alternative Arrangements for School Facilities

Mover: D. Bernier Second: H. McCarthy

that the Board continues to consider proposed opportunities to implement alternative accommodation arrangements as they arise, in conjunction with the Policy 106 entitled, 'Alternative Arrangements for School Facilities'.

A copy of the Board's policies regarding operating savings and alternative arrangements for school facilities are found in Appendix C2 of this document.

EDC Submission (Forms E, F and G)

The following sheets detail, for each elementary and secondary review area:

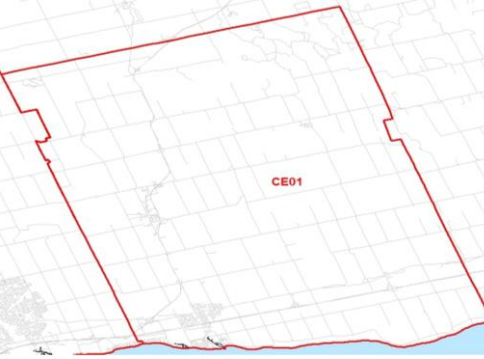
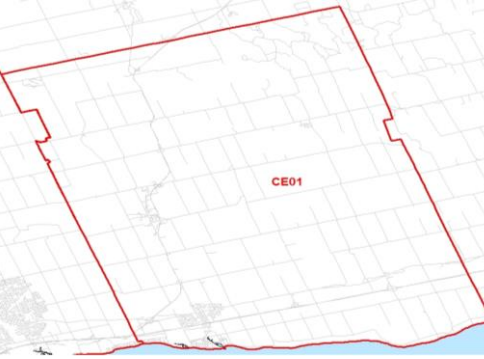
- the cumulative number of forecasted new dwelling units by type;
- the weighted/blended pupil yield by unit type and the number of growth-related pupil places generated by the 15-year housing forecast;
- the existing schools within each review area, the OTG capacity for EDC purposes, distinguished between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

additional growth-related school sites are in the process of being secured or have been identified by the board as a future need);

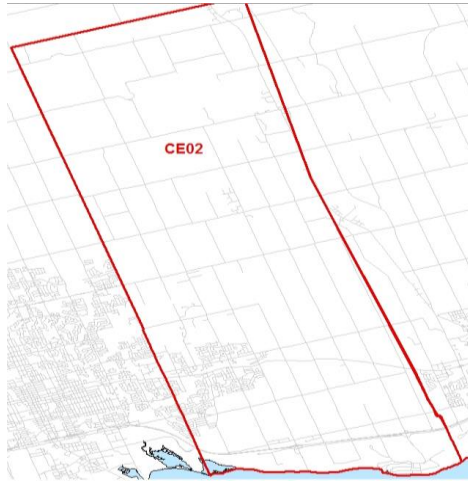
- the projected existing community enrolment;
- the cumulative requirements of new development and the determination of the number of available and surplus pupil places;
- the number of net growth-related pupil places and the number of eligible pupil places;
- comments detailing the Board's capital priorities, and the determination of the number of historical net growth-related pupil places (NGRPP);

a description of the growth-related site acquisition needs, the number of eligible acres, the anticipated cost per acre, the site preparation costs, financing costs and total education land costs.


PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD - Forms E, F and G
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2015

Review Area: CE01 - Newcastle Elementary						Year 1 2015/16	Year 2 2016/2017	Year 3 2017/2018	Year 4 2018/2019	Year 5 2019/2020	Year 6 2020/2021	Year 7 2021/2022	Year 8 2022/2023	Year 9 2023/2024	Year 10 2024/2025	Year 11 2025/2026	Year 12 2026/2027	Year 13 2027/2028	Year 14 2028/2029	Year 15 2029/2030	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils	
Projected Housing Growth						87	87	144	144	144	144	144	182	182	182	182	182	240	240	240	0.1738	2,522	438	
Singles						23	23	23	23	23	23	23	22	22	22	22	22	19	19	19	0.0788	327	26	
Medium Density						8	8	21	21	21	21	21	33	33	33	33	33	39	39	39	0.0050	404	2	
High Density																								
Total Gross Dwelling Units						118	118	188	188	188	188	188	237	237	237	237	237	297	297	297	0.1433	3,252	466	
Requirements of Existing Community:																								
Review Area Schools				OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30	Year 15 ROND		Number of Temp. Facilities	
B1																								
B2																								
B3																								
B4																								
B5																								
B6																								
B7																								
B8																								
B9																								
B10																								
B11																								
B12																								
B13																								
B14																								
B15																								
B16																								
B17																								
Totals				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		0		
Total Available Pupil Spaces to Accommodate Growth						-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-			
Review Area Schools Impacted by Housing Growth:				OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities	
C1 St. Francis E.S. (Replacement)				510	475	499	510	504	500	506	505	488	481	477	463	455	447	438	431	426			0	
C2																								
C3																								
C4																								
C5																								
C6																								
C7																								
C8																								
Totals				510	475	499	510	504	500	506	505	488	481	477	463	455	447	438	431	426			0	
Total Available Pupil Spaces to Accommodate Growth					35	11	0	6	10	4	5	23	29	33	47	55	63	72	79	84	0			
Requirements of New Development for High Growth Areas (Cumulative):						16	32	58	84	110	139	169	206	242	279	313	345	386	426	466				
E Less: Available Pupil Places to Accommodate Growth						-11	0	-6	-10	-4	-5	-23	-29	-33	-47	-55	-63	-72	-79	-84				
F Equals: Net growth-related Pupil Place Requirements						5	32	52	74	106	134	146	176	209	232	257	282	314	347	382				
Description of Growth-related Need:																								
Growth-related Net Education Lands Costs				Site	Proposed Year of	NGRPP	Proposed School	% of Capacity Attributable to NGRPP	Total # of Acres	EDC Eligible	Cost per	Education Land	Eligible Site Preparation	Land Escalation	Site Preparation Escalation	Less Previously Financed from Predecessor By-law	Financing	Total Education						
Description of Growth-related Site Acquisition Needs:				Status	Acquisition	Requirements	Capacity	Requirements	Required	Acres	Acre	Costs	Costs	Costs	Costs	Costs	Costs	Land Costs						
1 New Newcastle CS #1				TBD	2021	382	510	74.8%	6.00	4.5	\$358,000	\$1,606,788	\$316,501	\$443,926	\$54,331		\$45,948	\$2,467,494						
2																								
3																								

PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD - Forms E, F and G
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2015

Review Area: CE02 - Courtice Elementary						Year 1 2015/16	Year 2 2016/2017	Year 3 2017/2018	Year 4 2018/2019	Year 5 2019/2020	Year 6 2020/2021	Year 7 2021/2022	Year 8 2022/2023	Year 9 2023/2024	Year 10 2024/2025	Year 11 2025/2026	Year 12 2026/2027	Year 13 2027/2028	Year 14 2028/2029	Year 15 2029/2030	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils		
Projected Housing Growth																									
	Singles					169	169	178	178	178	178	178	124	124	124	124	124	125	125	125	0.1734	2,221	385		
	Medium Density					45	45	42	42	42	42	42	36	36	36	36	36	37	37	37	0.0757	590	45		
	High Density					8	8	21	21	21	21	21	43	43	43	43	43	50	50	50	0.0048	487	2		
A	Total Gross Dwelling Units					222	222	241	241	241	241	241	203	203	203	203	203	211	211	211	0.1310	3,297	432		
Requirements of Existing Community:																									
B	Review Area Schools			OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30	Year 15 ROND		Number of Temp. Facilities		
	B1																								
	B2																								
	B3																								
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	B5																								
	B6																								
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	B11																								
	B12																								
	B13																								
	B14																								
	B15																								
	B16																								
	B17																								
	Totals			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0		
	Total Available Pupil Spaces to Accommodate Growth					-	-	-	-	-	-	-	-	-	-	-	-	-	-	-					
C	Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities		
	c1 Good Shepherd Catholic Elementary School			663	474	424	405	395	368	355	341	339	322	315	317	313	310	307	306	307			1		
	c2 Monsignor Leo Cleary School			210	184	186	196	199	207	214	211	221	229	235	225	222	219	218	217	218			2		
	c3 Mother Teresa School			441	406	413	429	437	435	453	459	461	470	472	455	449	442	438	436	437			0		
	c4																								
	c5																								
	c6																								
	c7																								
	c8																								
	Totals			1,314	1,064	1,024	1,029	1,030	1,010	1,022	1,010	1,022	1,021	1,023	997	984	971	963	959	961			3		
	Total Available Pupil Spaces to Accommodate Growth					291	285	284	304	292	304	292	293	291	317	330	343	351	355	353	1314				
D	Requirements of New Development for High Growth Areas (Cumulative):					32	64	97	131	165	204	243	273	303	332	353	375	394	413	432					
E	Less: Available Pupil Places to Accommodate Growth					-291	-285	-284	-304	-292	-304	-292	-293	-291	-317	-330	-343	-351	-355	-353					
F	Equals: Net growth-related Pupil Place Requirements					0	0	0	0	0	0	0	0	11	15	23	31	43	57	79					
Description of Growth-related Need:																									
	Growth-related Net Education Lands Costs			Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs							
1	Accommodate in existing facilities					79																			
2																									
3																									
4																									
5																									

PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD - Forms E, F and G
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2015

Review Area: CE03 - Bowmanville Elementary						Year 1 2015/16	Year 2 2016/2017	Year 3 2017/2018	Year 4 2018/2019	Year 5 2019/2020	Year 6 2020/2021	Year 7 2021/2022	Year 8 2022/2023	Year 9 2023/2024	Year 10 2024/2025	Year 11 2025/2026	Year 12 2026/2027	Year 13 2027/2028	Year 14 2028/2029	Year 15 2029/2030	Weighted/Blended Elementary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils	
Projected Housing Growth																								
	Singles					202	202	318	318	318	318	318	372	372	372	372	372	411	411	411	0.1739	5,085	884	
	Medium Density					73	73	101	101	101	101	101	123	123	123	123	123	128	128	128	0.0728	1,649	120	
	High Density					110	110	85	85	85	85	85	124	124	124	124	124	143	143	143	0.0051	1,695	9	
A	Total Gross Dwelling Units					385	385	504	504	504	504	504	619	619	619	619	619	681	681	681	0.1202	8,428	1,013	
Requirements of Existing Community:																								
B	Review Area Schools			OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30	Year 15 ROND		Number of Temp. Facilities	
B1																								
B2																								
B3																								
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B8																								
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B10																								
B11																								
B12																								
B13																								
B14																								
B15																								
B16																								
B17																								
	Totals			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0	
	Total Available Pupil Spaces to Accommodate Growth					-	-	-	-	-	-	-	-	-	-	-	-	-	-	-				
C	Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2014/15	Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities	
C1	Holy Family Catholic Elementary School			752	625	645	654	662	673	694	702	691	695	680	678	675	677	676	677	678			0	
C2	St. Elizabeth Catholic ES			386	503	511	534	551	557	556	560	570	563	566	557	556	558	558	559	560			6	
C3	St. Joseph's School-Bowmanville			496	478	485	513	526	545	564	571	577	573	582	584	588	591	595	600	606			0	
C4																								
C5																								
C6																								
C7																								
C8																								
	Totals			1,634	1,606	1,642	1,700	1,739	1,775	1,814	1,833	1,837	1,831	1,828	1,820	1,819	1,826	1,829	1,836	1,843				
	Total Available Pupil Spaces to Accommodate Growth					0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1634		6	
D	Requirements of New Development for High Growth Areas (Cumulative):					39	78	138	198	258	326	394	475	558	639	712	785	861	937	1,013				
E	Less: Available Pupil Places to Accommodate Growth					0	0	0	0	0	0	0	0	0	0	0	0	0	0					
F	Equals: Net growth-related Pupil Place Requirements					39	78	138	198	258	326	394	475	558	639	712	785	861	937	1,013				
Description of Growth-related Need:																								
Growth-related Net Education Lands Costs																								
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	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs						
1	New Bowmanville CS #1			TBD	2018	510	510	100.0%	6.00	6.0	\$366,000	\$2,196,000	\$423,108	\$346,145	\$44,037		\$57,100	\$3,066,390						
2	New Bowmanville CS #2			TBD	2024	503	500	100.0%	5.00	5.0	\$366,000	\$1,830,000	\$352,590	\$505,595	\$85,811		\$52,636	\$2,826,632						
3																								
4																								
3																								

PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD - Forms E, F and G
EDUCATION DEVELOPMENT CHARGES SUBMISSION 2015

Review Area: CS01: Municipality of Clarington						Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30	Weighted/Blended Secondary Yield	Total Net New Units 2027/28	Total Yr. 15 Growth-related Pupils
Projected Housing Growth																							
	Singles					457	457	640	640	640	640	640	678	678	678	678	678	775	775	775	0.0685	9,827	673
	Medium Density					141	141	166	166	166	166	166	181	181	181	181	181	183	183	183	0.0304	2,565	78
	High Density					126	126	127	127	127	127	127	200	200	200	200	200	232	233	233	0.0049	2,585	13
A	Total Gross Dwelling Units					724	724	933	933	933	933	933	1,059	1,059	1,059	1,059	1,059	1,189	1,190	1,190	0.0510	14,976	764
Requirements of Existing Community:																							
Review Area Schools With Limited Impact From New Development			OTG Capacity	Current 2014/15		Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities
B1																							
B2																							
B3																							
B4																							
B5																							
B6																							
B7																							
B8																							
B9																							
B10																							
B11																							
B12																							
B13																							
B14																							
B15																							
	Totals		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			0
	Total Available Pupil Spaces to Accommodate Growth																						
Review Area Schools Impacted by Housing Growth:			OTG Capacity	Current 2014/15		Year 1 2015/16	Year 2 2016/17	Year 3 2017/18	Year 4 2018/19	Year 5 2019/20	Year 6 2020/21	Year 7 2021/22	Year 8 2022/23	Year 9 2023/24	Year 10 2024/25	Year 11 2025/26	Year 12 2026/27	Year 13 2027/28	Year 14 2028/29	Year 15 2029/30			Number of Temp. Facilities
C1	Holy Trinity Catholic Secondary School		693	777		728	661	611	615	542	553	538	504	515	525	554	565	579	560	550			23
C2	St. Stephen's Secondary School		1146	943		929	878	844	827	839	878	902	930	970	1011	1011	1007	1008	990	979			9
C3																							
C4																							
C5																							
C6																							
C7																							
C8																							
	Totals		1,839	1,720		1,657	1,538	1,456	1,442	1,381	1,430	1,441	1,434	1,485	1,535	1,566	1,571	1,587	1,550	1,529			
	Total Available Pupil Spaces to Accommodate Growth					182	301	383	397	459	409	398	405	354	304	273	268	252	289	310	1839	0	32
Requirements of New Development for High Growth Areas (Cumulative):						29	57	95	133	172	219	266	319	372	426	488	550	621	692			764	
E	Less: Available Pupil Places to Accommodate Growth																					-310	
F	Equals: Net growth-related Pupil Place Requirements																					454	
Description of Growth-related Need:																							
Growth-related Net Education Lands Costs			Site Status	Proposed Year of Acquisition	NGRPP Requirements	Proposed School Capacity	% of Capacity Attributable to NGRPP Requirements	Total # of Acres Required	EDC Eligible Acres	Cost per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Site Preparation Escalation Costs	Less Previously Financed from Predecessor By-law	Financing Costs	Total Education Land Costs						
1	New Clarington CSS #1		TBD	2025	454	1,100	41.2%	12.00	4.9	\$374,000	\$1,850,280	\$348,872	\$511,198	\$93,582		\$53,204	\$2,857,136						
2																							
3																							

8.6 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 8-3 summarizes the EDC account collections to August 2014 for the Peterborough Victoria Northumberland and Clarington Catholic District School Board. The collections cover the period which corresponds to implementation of the existing 2010 EDC by-law to the aforementioned reconciliation date and includes collections from residential development, as well as any proceeds from the disposition of surplus properties (i.e., to the extent that the disposed of site was previously funded through education development charges), any interest earned on the account to date, any interest expense on account deficits to date and any refunds or overpayments during this time period.

TABLE 8-3

**PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD
ACCOUNT RECONCILIATION – REVENUE
EDC Collection Period – June 30, 2010 to August 31, 2014**

	Column 1	2	3	4	5
	Collections by Year	EDC's from Residential and Non-Residential Development	Plus: Interest Earned	Less: Refunds and Overpayments/ Adjustments including Interest	Net Collections
1	2010-11	\$ 107,259	\$ 2,521		\$ 109,780
2	2011-12	\$ 88,630	\$ 3,320		\$ 91,950
3	2012-13	\$ 63,422	\$ 4,135		\$ 67,557
4	2013-14	\$ 80,831	\$ -		\$ 80,831
	Total Revenues				\$ 350,118

Section 7(5) of O.Reg 20/98 requires that a board estimate the EDC account collections and eligible expenditures on the day immediately before the day the board intends to have the new by-law come into

force. This “estimate” is typically undertaken several months in advance of the implementation of the new by-law. The EDC account reconciliation undertaken herein, dates back to the original EDC by-law in order to ensure that “actual,” rather than “estimated” revenues and expenditures have been taken into account on a go forward basis.

Table 8-4 calculates the “estimated” EDC account balance as of June 30, 2015 which is the day before the in-force date of the proposed by-law. The estimate of revenue for the September 1, 2014 to June 30, 2015 period is based on the estimated monthly collections data for this time period.

Table 8-4 also determines the eligible EDC expenditures for the Board and details site acquisition costs, “net” site preparation and development costs, study costs, and interest costs. Finally, the portion of the expenditures eligible to be funded through education development charges is shown and a cumulative EDC account balance is determined. For the PVNCC, there is an account deficit in the order of \$371,354. It is noted that any additional costs related to these EDC eligible sites, and expended after the account reconciliation undertaken as of April 17, 2015, will be included in the reconciliation of the next EDC by-law.

TABLE 8-4

PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD
EDUCATION DEVELOPMENT CHARGE BY-LAW
EDC Account Reconciliation - Revenues less Expenditures
EDC By-law Period - July 5, 2010 to June 30, 2015 (Date before Proposed By-law Implementation Date)

1	Estimated EDC Account Balance as at July 5, 2010										\$120,774
2	Collections : EDC Account Net Collections as at August 31, 2014 (including Accrued Interest)										\$350,118
3	Estimated EDC Account Collections September 1, 2009 to August 31, 2010 (including Accrued Interest)										\$32,774
4	Actual EDC Account Collections September 1, 2009 to August 31, 2010 (including Accrued Interest)										\$54,822
5	Adjustment to reflect Actual EDC Account Collections 2009-10 (including Accrued Interest)										\$22,048
6	Estimated EDC Account Collections September 2014 to June 30, 2015										\$57,892
7	Total Estimated EDC Account Collections at Proposed By-law Implementation										\$583,606
EDC Expenditure to Date:											
	Expenditures	Year Site Acquired	Site Size in acres	Site Acquisition Costs	Site Preparation Costs	Total Costs incurred	Costs Funded under a Previous EDC By-law	Non- Growth Related Share of Expenditure	Growth-related Share of Expenditure	Eligible to be financed from Existing EDC Account	EDC Account Balance
	St. Joseph, Bowmanville			\$789,759	\$84,364	\$874,123		0.0%	100.0%	\$874,123	-\$290,517
	Study Costs									\$80,837	-\$371,354
	Interest Costs									\$0	-\$371,354
	Totals			\$789,759	\$84,364	\$874,123	\$ -			\$954,960	-\$371,354
Estimated EDC Account Surplus (Deficit) as at Proposed By-law Implementation											
-\$371,354											

8.7 Cash Flow Analysis and Forms H1 and H2

Table 8-5 set outs a fifteen-year cashflow analysis of the proposed capital expenditure program for school sites. Immediately following this table is the Form H1 that identifies the Residential and Non-Residential EDC as reflected in Table 8-5.

The quantum of the charge is determined on the basis of a 100% residential share, for the Board. As well, a sensitivity analysis is provided, for various non-residential ratios ranging between 0% and 40%.

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

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

Cash Flow Assumptions:

- site acquisition costs are assumed to escalate by 5.0%;
- site development costs are assumed to escalate at 2% per annum;
- site acquisition costs are inflated only over the term of the by-law period (five years); site development costs escalate over the full fifteen year forecast period;
- the Education Development Charge account accrues 1.65% interest earnings per annum;
- all interim financing is assumed to be undertaken on a short term basis for a five-year term at a cost of 2.98%.

Scenario Comments:	
PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD BOTH PANELS	

Cashflow Assumptions	
A. EDC Account interest earnings (per annum):	1.65%
B. L/T Debenture Rate	3.98%
C. S/T Borrowing Rate	2.98%
D. L/T Debenture Term (years)	10
E. S/T Borrowing Term (years)	5

TABLE 8-5
PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD
Cashflow Analysis for Both Panels (Total Jurisdiction)
Current (2015) \$

Form H2					
Type of Development (Form B/C)	Net New Units	Total ROND	Distribution Factor	Net Education Land Cost by Development Type	Differentiated Residential EDC Per Unit
Low Density	9,827	2,381	89%	\$ 9,464,153	\$ 963
Medium Density	2,565	268	10%	\$ 1,066,485	\$ 416
High Density	2,585	26	1%	\$ 101,967	\$ 39

Sensitivity Analysis		
Non-res Share	Res Rate	Non-Res Rate
0%	\$789	\$0.00
5%	\$749	\$0.08
10%	\$710	\$0.16
15%	\$671	\$0.25
20%	\$631	\$0.33
25%	\$592	\$0.41
40%	\$473	\$0.66

	Previously Financed 2010 By-law	Year 1 2015/ 2016	Year 2 2016/ 2017	Year 3 2017/ 2018	Year 4 2018/ 2019	Year 5 2019/ 2020	Year 6 2020/ 2021	Year 7 2021/ 2022	Year 8 2022/ 2023	Year 9 2023/ 2024	Year 10 2024/ 2025	Year 11 2025/ 2026	Year 12 2026/ 2027	Year 13 2027/ 2028	Year 14 2028/ 2029	Year 15 2029/ 2030
Revenues:																
1 Alternative Accommodation Arrangements		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2 Operating Budget Surplus		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3 Assumed Debenture Financing		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4 S/T Borrowing Requirement		\$0	\$0	\$0	\$130,000	\$0	\$0	\$510,000	\$0	\$0	\$570,000	\$1,840,000	\$250,000	\$100,000	\$0	\$0
5 Subtotal (1 through 4)		\$0	\$0	\$0	\$130,000	\$0	\$0	\$510,000	\$0	\$0	\$570,000	\$1,840,000	\$250,000	\$100,000	\$0	\$0
6 EDC Revenue (Residential) 710 per unit		\$513,685	\$513,685	\$662,430	\$662,430	\$662,430	\$662,430	\$662,430	\$751,890	\$751,890	\$751,890	\$751,890	\$751,890	\$844,190	\$844,723	\$844,723
7 EDC Revenue (Non-residential) 0.16 per sq.ft		\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760	\$78,760
8 Subtotal EDC Revenue (6 + 7)		\$592,445	\$592,445	\$741,190	\$741,190	\$741,190	\$741,190	\$741,190	\$830,650	\$830,650	\$830,650	\$830,650	\$830,650	\$922,950	\$923,483	\$923,483
9 Total Revenue (5 + 8)		\$592,445	\$592,445	\$741,190	\$871,190	\$741,190	\$741,190	\$1,251,190	\$830,650	\$830,650	\$1,400,650	\$2,670,650	\$1,080,650	\$1,022,950	\$923,483	\$923,483
Expenditures:																
10 Site acquisition costs (escalated 5% per annum for 5 years)		\$0	\$0	\$0	\$2,542,145	\$0	\$0	\$2,050,714	\$0	\$0	\$2,335,595	\$2,361,478	\$0	\$0	\$0	\$0
11 Site preparation costs (escalated at 2% per annum to date of acquisition) ²		\$0	\$0	\$0	\$0	\$0	\$467,145	\$0	\$0	\$370,832	\$0	\$0	\$438,401	\$442,454	\$0	\$0
12 Deficit Recovery		\$74,271	\$74,271	\$74,271	\$74,271	\$74,271										
13 Study Costs		\$0					\$75,000					\$75,000				\$75,000
14 Debenture Carrying Costs		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
15 Short Term Borrowing Costs		\$0	\$0	\$0	\$0	\$28,370	\$28,370	\$28,370	\$139,667	\$139,667	\$111,297	\$235,688	\$637,231	\$580,492	\$602,315	\$602,315
16 Total Expenditures (10 through 15)	\$0	\$74,271	\$74,271	\$74,271	\$2,616,416	\$102,641	\$570,515	\$2,079,084	\$139,667	\$510,499	\$2,446,892	\$2,672,166	\$1,075,632	\$1,022,946	\$602,315	\$677,315
Cashflow Analysis:																
17 Revenues Minus Expenditures (9 - 16)		\$518,174	\$518,174	\$666,919	-\$1,745,226	\$638,549	\$170,675	-\$827,894	\$690,983	\$320,151	-\$1,046,242	-\$1,516	\$5,018	\$5	\$321,168	\$246,168
18 Opening Balance	\$0	\$0	\$518,174	\$1,053,448	\$1,748,753	\$3,586	\$652,730	\$836,992	\$9,248	\$711,785	\$1,048,963	\$2,765	\$1,270	\$6,391	\$6,501	\$333,076
19 Sub total (17 + 18)	\$0	\$518,174	\$1,036,348	\$1,720,367	\$3,528	\$642,135	\$823,406	\$9,098	\$700,231	\$1,031,936	\$2,720	\$1,249	\$6,287	\$6,396	\$327,669	\$579,244
20 Interest Earnings (12 months on Sub-total)		\$0	\$17,100	\$28,386	\$58	\$10,595	\$13,586	\$150	\$11,554	\$17,027	\$45	\$21	\$104	\$106	\$5,407	\$9,558
21 Closing Balance ² (19 + 20)	\$0	\$518,174	\$1,053,448	\$1,748,753	\$3,586	\$652,730	\$836,992	\$9,248	\$711,785	\$1,048,963	\$2,765	\$1,270	\$6,391	\$6,501	\$333,076	\$588,801

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

Total L/T debt issued: \$0
Total short term borrowing: \$3,400,000
Total debenture payments (current \$): \$3,709,908
Residual debt payment as of end of forecast period: \$576,127
Year in which outstanding debt is fully funded: 2032

PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD
Education Development Charges Submission 2015
Form H1 - EDC Calculation - Uniform Residential and Non-Residential

Determination of Total Growth-Related Net Education Land Costs

Total:	Education Land Costs (Form G)	\$	11,217,651
Add:	EDC Financial Obligations (Form A2)	\$	371,354
Subtotal:	Net Education Land Costs	\$	11,589,006
Less:	Operating Budget Savings	\$	-
	Positive EDC Account Balance	\$	-
Subtotal:	Growth-Related Net Education Land Costs	\$	11,589,006
Add:	EDC Study Costs	\$	225,000
Total:	Growth-Related Net Education Land Costs	\$	11,814,006

Apportionment of Total Growth-Related Net Education Land Costs

Total Growth-Related Net Education Land Costs to be Attributed to Non-Residential Development (Maximum 40%)	10%	\$	1,181,401
Total Growth-Related Net Education Land Costs to be Attributed to Residential Development	90%	\$	10,632,605

Calculation of Uniform Residential Charge

Residential Growth-Related Net Education Land Costs	\$	10,632,605
Net New Dwelling Units (Form C)		14,976
Uniform Residential EDC per Dwelling Unit	\$	710

Calculation of Non-Residential Charge - Use Either Board Determined GFA or Declared Value

Non-Residential Growth-Related Net Education Land Costs	\$	1,181,401
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	Non-Exempt Board-Determined GFA (Form D)	7,180,378
GFA Method:	Non-Residential EDC per Square Foot of GFA	\$ 0.16

Explanation of the Cash Flow Analysis:

A. Revenues

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

B. Expenditures

- Line 10 brings forward into the calculation the annual site acquisition costs. The timing of the capital expenditures generally determines the point at which the escalation factor of 5.0% per annum is applied.
- Line 11 incorporates the site preparation/development costs, and escalates these costs at 2% per annum.
- Line 12 calculates the expected recovery, if applicable, of the current deficit, distributed equally over the first 5 years of the forecast period.
- Line 13 incorporates the study costs specified under section 257.53(2) at the beginning of each new by-law period, and over the 15-year forecast period.
- Line 14 calculates the debenture carrying costs where longer term financing is appropriate. A 3.98% interest rate is assumed over the 10 year financing period. Interest is accrued beginning in the year following the issuance of the debt.

- Line 15 calculates the short term borrowing costs. An interest rate of 2.98% has been assumed over a five year term of borrowing. These borrowing costs include the repayment of the principal and interest
- Line 16 calculates total anticipated expenditures by totaling Lines 10 through 15.

C. Cash Flow Analysis

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

8.8 Non-Residential Share

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

The attribution of 90% of the net education capital costs to residential development and 10% to non-residential development to determine the education development charge per residential unit and per square foot of Gross Floor Area was based on the residential/non-residential share underlying the Board’s existing EDC by-law (i.e., 90% residential and 10% non-residential share). However, it is noted that the determination of the EDC charge based on any assumed share of non-statutory exempt residential development over the term of the by-law, and any proportionate share from non-residential (industrial, institutional and commercial) development, does not prejudice the Board’s final policy decision on this matter.

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

8.9 Education Development Charges

Finally, Table 8-6 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 8-6 PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD CALCULATION OF RESIDENTIAL AND NON-RESIDENTIAL EDUCATION DEVELOPMENT CHARGE	
Total Growth-Related Net Education Land Costs (over 15-year forecast period including associated financing and study costs)	\$ 11,814,006
Costs Financed in the Previous 2010 By-law	\$ -
Site Acquisition Costs	\$ 7,483,068
Land Escalation Costs	\$ 1,806,864
Site Preparation Costs	\$ 1,441,071
Site Preparation Escalation Costs	\$ 277,761
Debenture Interest Payments	\$ -
Short Term Debt Interest Payments	\$ 208,887
Study Costs	\$ 225,000
Financial Obligations/Surplus (projected EDC Account Balance as of July 1, 2015)	\$ 371,354
Interest Earnings	\$ 113,695
Closing Account Balance ¹	\$ 588,801
Total Net New Units	14,976
Total Non-Residential, Non-Exempt Board-Determined GFA	7,180,378
Residential Education Development Charge Per Unit based on 90% of Total Growth-Related Net Education Land Costs	\$ 710
Non-Residential Education Development Charge Per Sq. Ft. of GFA based on 10% of Total Growth-Related Net Education Land Costs	\$ 0.16

[1] Reflects the EDC account balance in Year 15 (2029/30) which would be required to fund the residual debt requirement of \$576,127 for the Board.

Appendix A1: Kawartha Pine Ridge District School Board – Draft EDC By-law – Municipality of Clarington

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
EDUCATION DEVELOPMENT CHARGES BY-LAW
FOR THE MUNICIPALITY OF CLARINGTON

A by-law for the imposition of education development charges

WHEREAS subsection 257.54 (1) of the *Education Act* provides that if there is residential development in the area of jurisdiction of a district school board of education that would increase education land costs, the district school 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 provided that the development requires one or more of the actions identified in subsection 257.54(2) of the *Education Act*;

AND WHEREAS the Kawartha Pine Ridge District School Board (the “Board”) has referred to the Minister of Education the following estimates with respect to the Municipality of Clarington for approval:

- (i) the total number of new elementary school pupils and new secondary school pupils;
and
- (ii) the number of elementary school sites and secondary school sites used to determine the net education land costs;

which estimates the Minister of Education approved on _____, 2015 in accordance with section 10 of Ontario Regulation 20/98, as amended;

AND WHEREAS at the time of expiry of the Kawartha Pine Ridge District School Board 2010 Education Development Charges By-law (Municipality of Clarington), the balance in the education development charge reserve fund with respect to the said by-law 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 education development charges to be imposed under this by-law;

AND WHEREAS the Board has given a copy of the education development charge background study relating to this by-law to the Minister of Education and to each school board having jurisdiction within the area to which this by-law applies;

AND WHEREAS the Board has given notice of and held a public meeting on May 4, 2015, in accordance with subsection 257.60(2) of the *Education Act*;

AND WHEREAS the Board has given notice of and held a public meeting on May 4, 2015 in accordance with subsection 257.63(1) of the *Education Act*;

AND WHEREAS the Board has permitted any person who attended the public meetings on May 4, 2015 to make representations in respect of the proposed education development charges and by-law;

NOW THEREFORE THE KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD
HEREBY ENACTS AS FOLLOWS:

PART I

APPLICATION

Defined Terms

1. In this by-law,
 - (a) “Act” means the *Education Act*, R.S.O. 1990, c.E.2, as amended, or a successor statute;
 - (b) “agricultural building or structure” means a building or structure used, or designed or intended for use for the purpose of a *bona fide* farming operation including, but not limited to, animal husbandry, dairying, fallow, field crops, removal of sod, forestry, fruit farming, horticulture, market gardening, pasturage, poultry keeping and any other activities customarily carried on in the field of agriculture, and residential buildings which are used exclusively to provide living accommodation for employees of the operator of the farming operation and which are occupied for fewer than six (6) consecutive months during each calendar year, but shall not include a dwelling unit or any other building or structure or parts thereof used for other retail, commercial, office, industrial or institutional purposes which constitute non-residential development;
 - (c) “Board” means the Kawartha Pine Ridge District School Board;
 - (d) “development” includes redevelopment;
 - (e) “dwelling unit” means a room or suite of rooms used, or designed or intended for use by one person or persons living together, in which culinary and sanitary facilities are provided for the exclusive use of such person or persons, and shall include, but is not limited to, a dwelling unit or units in an apartment, group home, mobile home, duplex, triplex, semi-detached dwelling, single detached dwelling, stacked townhouse and townhouse;

- (f) “education land costs” means costs incurred or proposed to be incurred by the Board,
 - (i) to acquire land or an interest in land, including a leasehold interest, to be used by the Board to provide pupil accommodation;
 - (ii) to provide services to the land or otherwise prepare the site so that a building or buildings may be built on the land to provide pupil accommodation;
 - (iii) to prepare and distribute education development charge background studies as required under the Act;
 - (iv) as interest on money borrowed to pay for costs described in paragraphs (i) and (ii); and
 - (v) to undertake studies in connection with an acquisition referred to in paragraph (i).but not:
 - (vi) costs of any building to be used to provide pupil accommodation; or
 - (vii) costs that are prescribed in the Regulation as costs that are not education land costs.
- (g) “education development charge” means charges imposed pursuant to this by-law in accordance with the Act;
- (h) “existing industrial building” means a 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,
 - (1) carried out with respect to manufacturing, producing, processing, storage or distributing of something, and
 - (2) in or attached to the building or structure used for that manufacturing, producing, processing, storage or distribution;
- (i) “gross floor area of non-residential development” means in the case of a non-residential building or structure or the non-residential portion of a mixed-use building or structure, 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, as amended, other than a board defined in subsection 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;
 - (l) “Municipality” means the Municipality of Clarington in the Regional Municipality of Durham;
 - (m) “non-residential building or structure” means a building or structure or portions thereof used, or designed or intended for use for other than residential use and includes, but is not limited to, an office, retail, industrial or institutional, building or structure;
 - (n) “non-residential development” means a development other than a residential development and includes, but is not limited to, office, retail, industrial or institutional development;
 - (o) “non-residential use” means lands, buildings or structures or portions thereof used, or designed or intended for use for other than residential use and includes, but is not limited to, an office, retail, industrial or institutional use;
 - (p) “*Planning Act*” means the Planning Act, R.S.O. 1990, c. P.13, as amended;
 - (q) “Region” means the Regional Municipality of Durham;
 - (r) “Regulation” means Ontario Regulation 20/98, as amended, made under the Act;
 - (s) “residential development” means lands, buildings or structures developed or to be developed for residential use.
 - (t) “residential use” means lands, buildings or structures used, or designed or intended for use as a dwelling unit or units, and shall include a residential use accessory to a non-residential use and the residential component of a mixed use or agricultural use.
2. In this by-law where reference is made to a statute or a section of a statute such reference is deemed to be a reference to any successor statute or section.

Lands Affected

3. (1) Subject to subsections (2) and (3), this by-law applies to all lands in the Municipality.
- (2) This by-law shall not apply to lands that are owned by and are used for the purposes of:
 - (a) the Municipality or a local board thereof;
 - (b) a board as defined in subsection 257.53(1) of the Act;
 - (c) the Region or a local board thereof;
 - (d) a publicly funded university established by a special act of the Legislative Assembly of Ontario which exempts the property of such university from taxation for school purposes or a college of applied arts and technology established under the *Ontario Colleges of Applied Art and Technology Act, 2002*, S.O. 2002, c.8, Schedule F, as amended; or,
 - (e) a public hospital receiving aid under the *Public Hospitals Act*, R.S.O. 1990, c.26.
- (3) This by-law shall not apply to non-residential agricultural buildings or structures that are owned by and are used for the purposes of a *bona fide* farming operation.

Approvals for Development

4. Education development charges shall be imposed against all lands, buildings or structures undergoing residential development if the development requires one or more of the following:
 - (a) the passing of a zoning by-law or of an amendment thereto 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 the *Condominium Act, 1998*, S.O. 1998, c. C.19, as amended; or
 - (g) the issuing of a permit under the *Building Code Act, 1992*, S.O. 1992, c.23, as amended, in relation to a building or structure.
5. Education development charges shall be imposed against all lands, buildings or structures

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undergoing non-residential development which has the effect of creating gross floor area of non-residential development or of increasing existing gross floor area of non-residential development if the development requires one or more of the following:

- (a) the passing of a zoning by-law or of an amendment thereto 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 the *Condominium Act, 1998*; or
 - (g) the issuing of a permit under the *Building Code Act, 1992* in relation to a building or structure.
6. The Board has determined that the residential development of land in the area of jurisdiction of the Board increases education land costs.

Categories of Development and Uses of Land Subject to Education Development Charges

- 7. Subject to the provisions of this by-law, education development charges shall be imposed upon all categories of residential development and non-residential development.
- 8. Subject to the provisions of this by-law, education development charges shall be imposed upon all uses of land, buildings or structures.

PART II

EDUCATION DEVELOPMENT CHARGES

Residential Education Development Charges

- 9. Subject to the provisions of this by-law, an education development charge of \$ ● per dwelling unit shall be imposed upon the designated categories of residential development and the designated residential uses of land, 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.

Exemptions from Residential Education Development Charges

10. (1) In this section,
 - (a) “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;
 - (b) “other residential building” means a residential building not in another class of residential building described in this section;
 - (c) “semi-detached or row dwelling” means a residential building consisting of one dwelling unit having one or two vertical walls, but no other parts, attached to another structure;
 - (d) “single detached dwelling” means a residential building consisting of one dwelling unit that is not attached to another building.
- (2) Subject to subsections (3) and (4), education development charges shall not be imposed with respect to,
 - (a) the enlargement of an existing dwelling unit that does not create an additional dwelling unit;
 - (b) the creation of one or two additional dwelling units in an existing single detached dwelling; or
 - (c) the creation of one additional dwelling unit in a semi-detached dwelling, a row dwelling, or any other residential building.
- (3) Notwithstanding clause (2)(b), education development charges shall be imposed in accordance with section 9 if the total gross floor area of the additional unit or two additional dwelling units exceeds the gross floor area of the existing single detached dwelling.
- (4) Notwithstanding clause (2)(c), education development charges shall be imposed in accordance with section 9 if the additional dwelling unit has a gross floor area greater than,
 - (a) in the case of a semi-detached or row dwelling, the gross floor area of the existing dwelling unit; or
 - (b) in the case of any other residential building, the gross floor area of the smallest dwelling unit already contained in the residential building.
11. (1) Education development charges under section 9 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 9 if the building permit for the replacement dwelling unit is issued more than 2 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 9 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) Education development charges shall be imposed in accordance with section 12 where the dwelling unit described in subsection (1) is replaced by or converted to, in whole or in part, non-residential development.

Non-Residential Education Development Charges

12. Subject to the provisions of this by-law, an education development charge of \$ ● per square foot (\$ ● per square metre) of gross floor area of non-residential development shall be imposed 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.

Exemptions from Non-Residential Education Development Charges

13. Notwithstanding section 12 of this by-law, education development charges shall not be imposed upon a non-residential development if the development does not have the effect of creating gross floor area of non-residential development or of increasing existing gross floor area of non-residential development.
14.
 - (1) Education development charges under section 12 shall not be imposed with respect to the replacement, on the same site, of a non-residential building or structure that was destroyed by fire, demolition or otherwise, or that was so damaged by fire, demolition or otherwise as to render it unusable.
 - (2) Notwithstanding subsection (1), education development charges shall be imposed in accordance with section 12 if the building permit for the replacement non-residential building or structure is issued more than 5 years after,
 - (a) the date the former building or structure was destroyed or became unusable;

- or
- (b) if the former building or structure was demolished pursuant to a demolition permit issued before the former building or structure was destroyed or became unusable, the date the demolition permit was issued.
 - (3) Notwithstanding subsection (1), if the gross floor area of the non-residential part of the replacement building or structure exceeds the gross floor area of the non-residential part of the building or structure being replaced, education development charges shall be imposed in accordance with section 12 against the additional gross floor area. The onus is on the applicant to produce evidence to the satisfaction of the Board, acting reasonably, to establish the gross floor area of the non-residential building or structure being replaced.
 - (4) Education development charges shall be imposed in accordance with section 9 if the non-residential building or structure described in subsection (1) is replaced by or converted to, in whole or in part, a dwelling unit or units.
15. If a development includes the enlargement of the gross floor area of an existing industrial building, the amount of the education development charge that is payable in respect of the enlargement shall be 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.

PART III

ADMINISTRATION

Payment of Education Development Charges

16. Education development charges are payable in full to the municipality in which the development takes place on the date a building permit is issued in relation to a building or structure on land to which this education development charge by-law applies.
17. The treasurer of the Board shall establish and maintain an educational development charge

reserve fund in accordance with the Act, the Regulation and this by-law.

Payment by Services

18. Notwithstanding the payments required under section 16, and subject to section 257.84 of the Act, the Board may, by agreement, permit an owner to provide land for pupil accommodation in lieu of the payment of all or a part of the education development charges.

Collection of Unpaid Education Development Charges

19. Section 349 of the *Municipal Act, 2001*, S.O. 2001, c.25, as amended, 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

20. This by-law shall come into force on July 1, 2015. On such date, the Kawartha Pine Ridge District School Board 2010 Education Development Charges By-Law (Municipality of Clarington) shall be repealed.

Date By-Law Expires

21. This by-law shall expire on July 1, 2020, unless it is repealed at an earlier date.

Severability

22. In the event any provision, or part thereof, of this by-law is found by a court of competent jurisdiction to be *ultra vires*, such provision, or part thereof, shall be deemed to be severed, and the remaining portion of such provision and all other provisions of this by-law shall remain in full force and effect.

Interpretation

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

Short Title

24. This by-law may be cited as the Kawartha Pine Ridge District School Board 2015 Education Development Charges By-Law (Municipality of Clarington).

ENACTED AND PASSED this 18th day of June, 2015.

.....
Chairperson of the Board

.....
Director of Education and Secretary of the Board

Appendix A2: Peterborough Victoria Northumberland and Clarington Catholic District School Board – Draft EDC By-law – Municipality of Clarington

**PETERBOROUGH VICTORIA NORTHUMBERLAND AND
CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD**

EDUCATION DEVELOPMENT CHARGES BY-LAW

FOR THE MUNICIPALITY OF CLARINGTON

A by-law for the imposition of education development charges

WHEREAS subsection 257.54 (1) of the *Education Act* provides that if there is residential development in the area of jurisdiction of a district school board of education that would increase education land costs, the district school 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 provided that the development requires one or more of the actions identified in subsection 257.54(2) of the *Education Act*;

AND WHEREAS the Peterborough Victoria Northumberland and Clarington Catholic District School Board (the “Board”) has referred to the Minister of Education the following estimates with respect to the Municipality of Clarington for approval:

- (i) the total number of new elementary school pupils and new secondary school pupils; and
- (ii) the number of elementary school sites and secondary school sites used to determine the net education land costs;

which estimates the Minister of Education approved on _____, 2015 in accordance with section 10 of Ontario Regulation 20/98, as amended;

AND WHEREAS at the time of expiry of the Peterborough Victoria Northumberland and Clarington Catholic District School Board 2010 Education Development Charges By-law (Municipality of Clarington), the balance in the education development charge reserve fund with respect to the said by-law 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 education development charges to be imposed under this by-law;

AND WHEREAS the Board has given a copy of the education development charge background study relating to this by-law to the Minister of Education and to each school board having jurisdiction within the area to which this by-law applies;

AND WHEREAS the Board has given notice of and held a public meeting on May 4, 2015, in accordance with subsection 257.60(2) of the *Education Act*;

AND WHEREAS the Board has given notice of and held a public meeting on May 4, 2015, in accordance with subsection 257.63(1) of the *Education Act*;

AND WHEREAS the Board has permitted any person who attended the public meetings on May 4, 2015 to make representations in respect of the proposed education development charges and by-law;

NOW THEREFORE THE PETERBOROUGH VICTORIA NORTHUMBERLAND AND CLARINGTON CATHOLIC DISTRICT SCHOOL BOARD HEREBY ENACTS AS FOLLOWS:

PART I

APPLICATION

Defined Terms

1. In this by-law,
 - (a) “Act” means the *Education Act*, R.S.O. 1990, c.E.2, as amended, or a successor statute;
 - (b) “agricultural building or structure” means a building or structure used, or designed or intended for use for the purpose of a *bona fide* farming operation including, but not limited to, animal husbandry, dairying, fallow, field crops, removal of sod, forestry, fruit farming, horticulture, market gardening, pasturage, poultry keeping and any other activities customarily carried on in the field of agriculture, and residential buildings which are used exclusively to provide living accommodation for employees of the operator of the farming operation and which are occupied for fewer than six (6) consecutive months during each calendar year, but shall not include a dwelling unit or any other building or structure or parts thereof used for other retail, commercial, office, industrial or institutional purposes which constitute non-residential development;
 - (c) “Board” means the Peterborough Victoria Northumberland and Clarington Catholic District School Board;
 - (d) “development” includes redevelopment;
 - (e) “dwelling unit” means a room or suite of rooms used, or designed or intended for use by one person or persons living together, in which culinary and sanitary facilities are provided for the exclusive use of such person or persons, and shall include, but is not limited to, a dwelling unit or units in an apartment, group home, mobile home, duplex, triplex, semi-detached dwelling, single detached dwelling, stacked townhouse and townhouse;

- (f) “education land costs” means costs incurred or proposed to be incurred by the Board,
 - (i) to acquire land or an interest in land, including a leasehold interest, to be used by the Board to provide pupil accommodation;
 - (ii) to provide services to the land or otherwise prepare the site so that a building or buildings may be built on the land to provide pupil accommodation;
 - (iii) to prepare and distribute education development charge background studies as required under the Act;
 - (iv) as interest on money borrowed to pay for costs described in paragraphs (i) and (ii); and
 - (v) to undertake studies in connection with an acquisition referred to in paragraph (i).but not:
 - (vi) costs of any building to be used to provide pupil accommodation; or
 - (vii) costs that are prescribed in the Regulation as costs that are not education land costs.
- (g) “education development charge” means charges imposed pursuant to this by-law in accordance with the Act;
- (h) “existing industrial building” means a 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,
 - (1) carried out with respect to manufacturing, producing, processing, storage or distributing of something, and
 - (2) in or attached to the building or structure used for that manufacturing, producing, processing, storage or distribution;
- (i) “gross floor area of non-residential development” means in the case of a non-residential building or structure or the non-residential portion of a mixed-use

building or structure, 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, as amended, other than a board defined in subsection 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;
 - (l) “Municipality” means the Municipality of Clarington in the Regional Municipality of Durham;
 - (m) “non-residential building or structure” means a building or structure or portions thereof used, or designed or intended for use for other than residential use and includes, but is not limited to, an office, retail, industrial or institutional, building or structure;
 - (n) “non-residential development” means a development other than a residential development and includes, but is not limited to, office, retail, industrial or institutional development;
 - (o) “non-residential use” means lands, buildings or structures or portions thereof used, or designed or intended for use for other than residential use and includes, but is not limited to, an office, retail, industrial or institutional use;
 - (p) “*Planning Act*” means the Planning Act, R.S.O. 1990, c. P.13, as amended;
 - (q) “Region” means the Regional Municipality of Durham;
 - (r) “Regulation” means Ontario Regulation 20/98, as amended, made under the Act;
 - (s) “residential development” means lands, buildings or structures developed or to be developed for residential use.
 - (t) “residential use” means lands, buildings or structures used, or designed or intended for use as a dwelling unit or units, and shall include a residential use accessory to a non-residential use and the residential component of a mixed use or agricultural use.
2. In this by-law where reference is made to a statute or a section of a statute such reference is deemed to be a reference to any successor statute or section.

Lands Affected

3. (1) Subject to subsections (2) and (3), this by-law applies to all lands in the Municipality.
- (2) This by-law shall not apply to lands that are owned by and are used for the purposes of:
 - (a) the Municipality or a local board thereof;
 - (b) a board as defined in subsection 257.53(1) of the Act;
 - (c) the Region or a local board thereof; or,
 - (d) a publicly funded university established by a special act of the Legislative Assembly of Ontario which exempts the property of such university from taxation for school purposes or a college of applied arts and technology established under the *Ontario Colleges of Applied Art and Technology Act, 2002*, S.O. 2002, c.8, Schedule F, as amended.
- (3) This by-law shall not apply to non-residential agricultural buildings or structures that are owned by and are used for the purposes of a *bona fide* farming operation.

Approvals for Development

4. Education development charges shall be imposed against all lands, buildings or structures undergoing residential development if the development requires one or more of the following:
 - (a) the passing of a zoning by-law or of an amendment thereto 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 the *Condominium Act, 1998*, S.O. 1998, c. C.19, as amended; or
 - (g) the issuing of a permit under the *Building Code Act, 1992*, S.O. 1992, C.23, as amended, in relation to a building or structure.
5. Education development charges shall be imposed against all lands, buildings or structures undergoing non-residential development which has the effect of creating gross floor area of non-residential development or of increasing existing gross floor area of non-

residential development if the development requires one or more of the following:

- (a) the passing of a zoning by-law or of an amendment thereto 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 the *Condominium Act, 1998*; or
 - (g) the issuing of a permit under the *Building Code Act, 1992* in relation to a building or structure.
6. The Board has determined that the residential development of land in the area of jurisdiction of the Board increases education land costs.

Categories of Development and Uses of Land Subject to Education Development Charges

7. Subject to the provisions of this by-law, education development charges shall be imposed upon all categories of residential development and non-residential development.
8. Subject to the provisions of this by-law, education development charges shall be imposed upon all uses of land, buildings or structures.

PART II

EDUCATION DEVELOPMENT CHARGES

Residential Education Development Charges

9. Subject to the provisions of this by-law, an education development charge of \$ ● per dwelling unit shall be imposed upon the designated categories of residential development and the designated residential uses of land, 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.

Exemptions from Residential Education Development Charges

10. (1) In this section,
- (a) “gross floor area” means the total floor area, measured between the outside of exterior walls or between the outside of exterior walls and the

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- 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;
- (b) “other residential building” means a residential building not in another class of residential building described in this section;
 - (c) “semi-detached or row dwelling” means a residential building consisting of one dwelling unit having one or two vertical walls, but no other parts, attached to another structure;
 - (d) “single detached dwelling” means a residential building consisting of one dwelling unit that is not attached to another building.
- (2) Subject to subsections (3) and (4), education development charges shall not be imposed with respect to,
 - (a) the enlargement of an existing dwelling unit that does not create an additional dwelling unit;
 - (b) the creation of one or two additional dwelling units in an existing single detached dwelling; or
 - (c) the creation of one additional dwelling unit in a semi-detached dwelling, a row dwelling, or any other residential building.
 - (3) Notwithstanding clause (2)(b), education development charges shall be imposed in accordance with section 9 if the total gross floor area of the additional unit or two additional dwelling units exceeds the gross floor area of the existing single detached dwelling.
 - (4) Notwithstanding clause (2)(c), education development charges shall be imposed in accordance with section 9 if the additional dwelling unit has a gross floor area greater than,
 - (a) in the case of a semi-detached or row dwelling, the gross floor area of the existing dwelling unit; or
 - (b) in the case of any other residential building, the gross floor area of the smallest dwelling unit already contained in the residential building.
11. (1) Education development charges under section 9 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 9 if the building permit for the replacement dwelling unit is issued more than 2 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 9 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) Education development charges shall be imposed in accordance with section 12 where the dwelling unit described in subsection (1) is replaced by or converted to, in whole or in part, non-residential development.

Non-Residential Education Development Charges

- 12. Subject to the provisions of this by-law, an education development charge of \$ per square foot (\$ per square metre) of gross floor area of non-residential development shall be imposed 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.

Exemptions from Non-Residential Education Development Charges

- 13. Notwithstanding section 12 of this by-law, education development charges shall not be imposed upon a non-residential development if the development does not have the effect of creating gross floor area of non-residential development or of increasing existing gross floor area of non-residential development.
- 14.
 - (1) Education development charges under section 12 shall not be imposed with respect to the replacement, on the same site, of a non-residential building or structure that was destroyed by fire, demolition or otherwise, or that was so damaged by fire, demolition or otherwise as to render it unusable.
 - (2) Notwithstanding subsection (1), education development charges shall be imposed in accordance with section 12 if the building permit for the replacement non-residential building or structure is issued more than 5 years after,
 - (a) the date the former building or structure was destroyed or became unusable; or
 - (b) if the former building or structure was demolished pursuant to a demolition permit issued before the former building or structure was destroyed or became unusable, the date the demolition permit was issued.
 - (3) Notwithstanding subsection (1), if the gross floor area of the non-residential part of the replacement building or structure exceeds the gross floor area of the non-residential part of the building or structure being replaced, education development

charges shall be imposed in accordance with section 12 against the additional gross floor area. The onus is on the applicant to produce evidence to the satisfaction of the Board, acting reasonably, to establish the gross floor area of the non-residential building or structure being replaced.

- (4) Education development charges shall be imposed in accordance with section 9 if the non-residential building or structure described in subsection (1) is replaced by or converted to, in whole or in part, a dwelling unit or units.
- 15. If a development includes the enlargement of the gross floor area of an existing industrial building, the amount of the education development charge that is payable in respect of the enlargement shall be 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.

PART III

ADMINISTRATION

Payment of Education Development Charges

- 16. Education development charges are payable in full to the municipality in which the development takes place on the date a building permit is issued in relation to a building or structure on land to which this education development charge by-law applies.
- 17. The treasurer of the Board shall establish and maintain an educational development charge reserve fund in accordance with the Act, the Regulation and this by-law.

Payment by Services

- 18. Notwithstanding the payments required under section 16, and subject to section 257.84 of the Act, the Board may, by agreement, permit an owner to provide land for pupil accommodation in lieu of the payment of all or a part of the education development charges.

Collection of Unpaid Education Development Charges

19. Section 349 of the *Municipal Act, 2001*, S.O. 2001, c.25, as amended, 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

20. This by-law shall come into force on July 1, 2015. On such date, the Peterborough Victoria Northumberland and Clarington Catholic District School Board 2010 Education Development Charges By-Law (Municipality of Clarington), as amended, shall be repealed.

Date By-Law Expires

21. This by-law shall expire on July 1, 2020, unless it is repealed at an earlier date.

Severability

22. In the event any provision, or part thereof, of this by-law is found by a court of competent jurisdiction to be *ultra vires*, such provision, or part thereof, shall be deemed to be severed, and the remaining portion of such provision and all other provisions of this by-law shall remain in full force and effect.

Interpretation

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

Short Title

24. This by-law may be cited as the Peterborough Victoria Northumberland and Clarington Catholic District School Board 2015 Education Development Charges By-Law (Municipality of Clarington).

ENACTED AND PASSED this 23rd day of June, 2015.

.....
Chairperson of the Board

.....
Director of Education and Secretary of the Board

Appendix B: Background Document Pertaining to a Review of the Education Development Charge Policies of the Kawartha Pine Ridge District School Board and of the Peterborough Victoria Northumberland and Clarington Catholic District School Board for the Municipality of Clarington

The policy review document outlined herein is intended to provide the reader with an overview of the education development charge (EDC) policies underlying the existing 2010 EDC by-laws of the Kawartha Pine Ridge District School Board (KPRDSB) and the Peterborough Victoria Northumberland and Clarington Catholic District School Board (PVNCC) pursuant to Section 257.60, Division E, of the Education Act, as follows:

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

Moreover, the Board is required to:

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

B.1 KPR’s and PVNCC’s Existing EDC By-laws 2010

The Kawartha Pine Ridge and the Peterborough Victoria Northumberland and Clarington Catholic District School Boards adopted EDC by-laws governing the Municipality of Clarington in June 2010 with implementation in July 2010 under the existing legislation. The KPR’s and the PVNCC’s existing by-laws were adopted on June 25, 2010 with implementation of the approved charges on July 5, 2010. The Boards held joint public meetings on June 10, 2010 in consideration of the adoption of the by-laws on June 25, 2010.

In accordance with the legislation, the EDC by-laws may be in effect for no more than 5 years. Consequently, both the KPR and the PVNCC must have new EDC By-laws in force no later than July 5, 2015 to ensure that there is no gap in EDC collections.

B.2 Overview of EDC Policies

This section of the report provides an overview of the key education development charge policy issues that will be dealt with under the Boards’ proposed EDC by-laws. The KPR and the PVNCC Boards of Trustees, after consideration of public input, will make decisions on these policy issues prior to passage of new EDC by-laws anticipated to occur prior to July 5, 2015.

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

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

Policy discussions and decisions that are specific to the KPR and the PVNCC might also include:

1. Whether to consider differentiated residential EDC rates based on size of dwelling units, consistent with the Municipality of Clarington's DC by-law;
2. Any additional by-law exemptions;

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

Legislative Provisions:

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

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

- non-statutory exemptions granted by a school board, restrict full cost recovery;

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

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

Considerations:

One of the most significant considerations in the legislative treatment of education development charges is that there is no tax-based funding source to make up the shortfall where full cost recovery is not achieved. Most EDC legal practitioners are of the opinion that the granting of non-statutory exemptions during by-law adoption forces the board to absorb the loss of revenue associated with granting the exemptions. Many of the revenue sources under the existing education capital funding model are “enveloped” and are therefore not available to be used for purposes other than that for which they were legislatively intended. However, from a practical perspective, there is no mechanism in the legislation to account for non-statutory exemptions, moving from one by-law period to another.

The 2010 EDC by-laws of the KPR and the PVNCC each recover net education land costs from residential development (90%) and non-residential development (10%) within the Municipality of Clarington. No areas are exempted from the charge in the by-law. Only statutorily-exempt *residential* uses have been exempted from the imposition of education development charges in the Municipality of Clarington. Only statutorily-exempt *non-residential* uses have been exempted from the imposition of education development charges, with the exception of non-residential agricultural buildings. Therefore, the existing EDC by-laws are designed to recover as much of the net education land cost needs as the legislation will allow.

B.2.2 Mitigating EDC Account Deficits

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

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

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

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

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

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

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

Existing EDC By-law Provisions:

The existing ‘in force’ EDC by-laws are applied on a municipal-wide (and jurisdiction-wide) uniform basis.

The rationale for this decision is primarily based on the premise that:

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

Legislative Provisions:

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

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

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

Considerations:

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

the preparation of background studies, the establishment of EDC accounts and the expenditure of those funds, etc., is to be done on an individual by-law basis.

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

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

- The use of a uniform jurisdiction-wide EDC is consistent with the approach used to fund education costs under the Provincial funding model (i.e., the same per pupil funding throughout the Province), with a single tax rate for residential development (throughout the Province) and uniform region-wide tax rates for non-residential development (by type), and is consistent with the approach taken by the Board to make decisions with respect to capital expenditures;
- Uniform by-law structures are more consistent with the implementation of a board's capital program (i.e., school facilities where and when needed) and are more consistent with board philosophies of equal access to all school facilities for pupils;
- School attendance boundaries have, and will continue to shift over time, as boards deal with a dynamic accommodation environment and the need to make efficient use of limited capital resources, particularly given that they are dealing with ageing infrastructure, demographic shifts and continually changing curriculum and program requirements;
- Where the pace of housing development generates the need for a school site over a longer period of time, there is a need to temporarily house pupils in alternate accommodation; which consumes the asset lifecycle of the "hosting" facility, even if pupils are accommodated in portable structures;
- District school boards have a statutory obligation to accommodate all resident pupils and as such, pay less attention to municipal boundaries as the basis for determining by-law structure;

- A board must establish a separate EDC account for the by-law and may only use the funds to pay for growth-related net education land costs in that by-law area (unless the Minister of Education approves a redirection of funds);
- In a situation where pupils are accommodated in a by-law area other than their place of residence, there is the potential for stranded funds and the *Education Act* does not address this type of circumstance.
- Jurisdiction-wide application of the charge assists in minimizing the risk of less-than-full cost recovery, especially where attendance boundaries and accommodation strategies change over time.
- Where it is determined that stranding of EDC funds is not likely to occur over the by-law term, and an area specific by-law is adopted by the board, careful monitoring would be required on an on-going basis to ensure that the board does not subsequently find itself in a position where it was unable to fully fund growth-related site needs over the longer term. Where this situation has the potential to occur, a new by-law structure should be considered by the board as soon as possible, because there is no ability to make up the funding shortfall once building permits are issued;
- The ability to utilize EDC funds for capital borrowing purposes under an area specific by-law scheme is limited to borrowing for cash flow purposes only (i.e., revenue shortfalls), due to the inability, under the existing legislation, to recover net education land costs sufficient to repay the “borrowed” area;
- Multiple EDC accounts under a multiple by-law approach restrict the flexibility required to match the timing and location of site needs to available revenue sources and may compromise the timing of new school construction and increase financing costs;
- Multiple by-laws can give consideration to different patterns and levels of development (including composition of dwelling units) in that they incorporate variable rates throughout the region. The appropriateness of utilizing area specific by-laws to reflect economic diversity within a jurisdiction, should, however, be measured in the context of measurable potential market or development impact;
- The precedent for levying uniform municipal development charges for “soft services” (e.g., recreation, library) is well established, and is currently used in existing DC by-laws by virtually all municipalities. As well, infill dwelling units pay the same development charge for these services as new units in the major growth areas, despite the availability of existing facilities;

- While today there are few area specific EDC by-laws in the Province of Ontario, those that have been adopted or proposed, reflect areas where there is little or no expectation of cross-boundary attendance.

B.2.4 Non-Statutory Residential Exemptions

Legislative Provisions:

Under the legislation, residential statutory exemptions include:

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

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

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

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

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

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

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

Considerations:

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

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

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

The second alternative would be to differentiate the residential charge by type in order to establish a lower EDC rate for dwelling units that would typically be occupied by fewer school age children per household. However, the same unit type (e.g., single detached), with the same number of bedrooms, or square footage, could exhibit vastly different school age occupancies. The same difficulties prevail in trying to define a unit type that segregates various levels of school occupancy that is definable and can be easily implemented under

by-law application. It is noted that several municipal DC by-laws give regard to variations in occupancy due to size (i.e. square footage). There is nothing in the legislation that would prohibit a similar analysis for EDCs. Regardless of which approach is taken, there is no legislative ability to restrict the level of occupancy, and occupancy status could change over time.

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

B.2.5 Non-Statutory Non-residential Exemptions

Legislative Provisions:

Non-residential statutory exemptions include:

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

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

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

Considerations:

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

However, there is no funding source currently available under the new funding model to absorb the cost of providing non-statutory exemptions. In addition, by-law administration and collection of the charge, and the

ability to treat all development applications in a fair and equitable manner, are complicated by the granting of non-statutory exemptions.

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

Existing EDC By-law Provisions:

The KPR's and the PVNCC's existing "in-force" EDC by-laws apply to both residential and non-residential development. The existing "in-force" EDC by-laws do not apply to the Municipality or a local board thereof; a board as defined in subsection 257.53(1) of the *Education Act*; the Region or a local board thereof; a publicly funded university established by a special act of the Legislative Assembly of Ontario which exempts the property of such university from taxation for school purposes or a college of applied arts and technology established under the *Ontario Colleges of Applied Art and Technology Act*, 2002, S.O. 2002, c.8, Schedule F, as amended; a public hospital receiving aid under the *Public Hospitals Act*, R.S.O. 1990, c.26 or non-residential agricultural buildings or structures that are owned by and are used for the purposes of a *bona fide* farming operation.

B.2.6 Demolition and Conversion Credits

Legislative Provisions:

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

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

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

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

Both Boards’ EDC by-laws incorporate a two-year grace period, consistent with the legislation.

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

Both Boards’ EDC by-laws incorporate a five-year grace period for non-residential buildings, consistent with the legislation.

There are no legislative provisions specifically dealing with conversion of use. However, the EDC Guidelines, section 4.1, states that, “Board by-laws may include provisions for credits for land use conversion. Typically, this situation would arise if an EDC is paid for one type of development and shortly thereafter (the period of time defined in the board’s EDC by-law), the land is rezoned and a new building permit issued for redevelopment (to an alternate land use). EDC by-laws may include provisions for providing credits in this situation to take into account the EDC amount paid on the original development (generally by offsetting the EDC amount payable on the redevelopment).” The KPR and PVNCC EDC by-laws do not provide conversion of use credits.

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

Legislative Provisions:

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

Section 7 paragraph 8 of O.Reg. 20/98 requires that, “the board shall choose the percentage of the growth-related net education land cost that is to be funded by charges on residential development and the percentage,

if any, that is to be funded by charges on non-residential development.” “The percentage that is to be funded, by charges on non-residential development shall not exceed 40 percent.”

A board has the choice under the *Education Act*, of levying an EDC only on residential development (for partial or full eligible cost recovery), or levying a charge on both residential and non-residential development (up to a maximum of 40% of costs allocated to non-residential development).

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 capital funding model. All boards eligible to impose education development charges are likely to seek full eligible cost recovery (100%) under EDCs. However, the requirement for an EDC non-residential charge is optional under the *Education Act* and therefore boards may elect to recover 100% of costs from residential development or up to 40% from non-residential development (with the remainder to be recovered from residential development).

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

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

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

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

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

B.2.8 By-law Term

Legislative Provisions:

The *Education Act* permits a school board to adopt 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 adopt a new EDC by-law at any time, after preparing a new education development charge study, securing the Minister of Education's approval, and undertaking the required public process (s.257.58(2)).

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

- “1. Increase the amount of an education development charge that will be payable in any particular case.
2. Remove, or reduce the scope of, an exemption.

3. Extend the term of the by-law.” (s.257.70(2) and subject to s.257.58(1))

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

Considerations:

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

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

B.2.9 Application of Operating Surpluses to Capital Needs

Legislative Provisions:

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

Considerations:

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

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

The Provincial Funding Model prescribes “envelopes” which impact on the direction of budgetary surpluses, including the requirement that funds may not be moved from the classroom to non-classroom category; funds generated by special education needs cannot be used for other purposes; funds generated from capital

allocations (i.e., Capital Priorities or School Renewal) must be used for this purpose or placed in an account for future use. Only funds generated from the School Board Administration and Governance, Transportation and School Operations grants may be directed elsewhere (and therefore could be potentially used for education land costs).

The Kawartha Pine Ridge District School Board reviewed its existing policy and on February 26, 2015 and determined that there are no surplus operating funds to offset EDC-related expenditures.

Similarly, the Peterborough Victoria Northumberland and Clarington Catholic District School Board reviewed its existing policy and on February 24, 2015 and determined that there are no surplus operating funds to offset EDC-related expenditures.

B.2.10 Policy on Alternative Accommodation Arrangements

Legislative Provisions:

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

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

Considerations:

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

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

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

Based on approved funding under the Ministry of Education’s Capital Priorities Initiative, or through approved use of funds in a board’s Disposition of Real Property Account, funds may be utilized to enter into long and short term lease arrangements with the private sector, or to enter into multi-use partnership agreements with other school boards, municipalities or the private sector.

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

The Kawartha Pine Ridge District School Board reviewed its existing policy and on February 26, 2015 and indicated that it will continue to explore accommodation arrangements which may result in accommodation efficiencies; however, at this time there are no savings under this policy to offset EDC-related expenditures.

Similarly, the Peterborough Victoria Northumberland and Clarington Catholic District School Board reviewed its existing policy and on February 24, 2015 and indicated that it will continue to explore accommodation arrangements which may result in accommodation efficiencies; however, at this time there are no savings under this policy to offset EDC-related expenditures.

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

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

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

B.3.1 Appeals

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

B.3.2 Amendments

Legislative Provisions:

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

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

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

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

No amendments to the 2010 EDC By-laws for KPR or for PVNCC have been made.

B.3.3 Complaints

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

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

In addition,

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

No complaints have been filed to date with respect to the KPR's or the PVNCC's 2010 EDC by-law.

Appendix C1: Kawartha Pine Ridge District School Board -- EDC Policies Re Operating Surpluses and Alternative Accommodation Arrangements

RES 5.2 Attachment 2 February 11, 2015

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD

POLICY STATEMENT

Section: Business and Administrative Services

• **Budget**

Policy Code: BA-3.1

Policy: DISPOSITION OF ANNUAL SURPLUS/DEFICIT

Page 1

The Board recognizes that the financial results of each fiscal year will not be identical to the approved operating budget. Variances in operating revenues and expenditures will result in operating surpluses and deficits.

When a surplus or deficit is identified during the preparation of the Board's annual audited financial statements, administration will make recommendations for disposition of the surplus/deficit when the draft audited financial statements are presented, including timing of disposition of the funds.

Established: September 25, 2003

Revision Dates February 28, 2008
April 18, 2013

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD

POLICY STATEMENT

Section: Business and Administrative Services

• **Property and Facilities Services**

**Policy: ALTERNATIVE ARRANGEMENTS FOR
SCHOOL FACILITIES**

**Policy Code: BA-6.9
Page 1**

The Kawartha Pine Ridge District School Board supports the concept of exploring alternate arrangements for the accommodation of students other than the usual arrangement under which a school site is acquired and a stand-alone school is constructed. The Board recognizes that alternate arrangements can provide an opportunity to improve service delivery, reduce duplication of public facilities, maximize cost-effectiveness and reduce site size requirements.

Ontario Regulation 20/98 provides that the education development charge background study contain:

A statement of the board's policy concerning possible arrangements with municipalities, school boards or other persons or bodies in the public or private sector, including arrangements of a long-term or co-operative nature, which would provide accommodation for the new elementary school pupils and new secondary pupils ... without imposing education development charges, or with a reduction in such charges.

1. Alternative arrangements include a variety of strategies such as:
 - 1.1 forward buying,
 - 1.2 option agreements,
 - 1.3 lease buy-back,
 - 1.4 site exchanges,
 - 1.5 joint partnerships,
 - 1.6 leasing of sites/buildings, and
 - 1.7 reduction of site size by locating near a park.
2. The board will consider such arrangements with municipalities, school boards and persons or bodies in the public or private sector with the following conditions:
 - 2.1 the arrangement must be cost-effective and advantageous to the Board;
 - 2.2 the arrangement shall comply with all Ministry of Education guidelines, regulations and instructions;
 - 2.3 the Board shall retain sufficient governance authority over the design and operation of the facility to ensure that it is able to appropriately deliver program, preserving a suitable identity and ambience; and
 - 2.4 the school facility shall have a separate entrance with the school name on the exterior of the school.

Established: March 31, 2005

Revision Dates: November 29, 2012

Appendix C2: Peterborough Victoria Northumberland and Clarington Catholic District School Board -- EDC Policies Re Operating Surpluses and Alternative Accommodation Arrangements



BOARD POLICY	
Administrative Procedure Section FACILITIES	Policy Number 105
Administrative Procedure Number	Page 1 of 3

POLICY TITLE

School Sites - Operating Budget Surplus

1.0 PURPOSE

The Peterborough Victoria Northumberland and Clarington Catholic District School Board is committed to planning for and acquiring school sites which meet the needs of students in a cost effective manner. This policy sets out circumstances under which the Board shall determine whether funds are available for the purpose of acquiring school sites by purchase, lease, or otherwise.

2.0 POLICY

It is the policy of the Peterborough Victoria Northumberland and Clarington Catholic District School Board to conduct a review of operating budget savings that could be applied to reduce the growth related net education land costs.

3.0 GUIDELINES

- 3.1 Site needs shall be set out within the Board's Education Development Charges By-Laws and Background Studies where the same are prepared and enacted in order to generate funds for site purchases which are attributable to new development.
- 3.2 In municipalities where Education Development Charges By-Laws are not warranted, site need shall be considered during the Board's periodic review of its Long Term Plan for Pupil Accommodation.
- 3.3 In accordance with the regulations related to Education Development Charges By-Laws, school boards are to review their operating budget for possible savings that could be applied to reduce growth-related net education land costs.

FACILITIES

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3.4 In accordance with regulations related to Grants for Student Needs, only a surplus from the non-classroom part of the estimates is eligible to acquire school sites, thereby reducing the 'growth related net education land cost' and the education development by-law that may be levied by the Board.

3.5 Where there has been, or it appears that there will be, a surplus in the non-classroom part of the estimates of the Board in a fiscal year, the Board shall pass a motion substantially in the form below as part of its annual financial statement report to the Board:

"that the Peterborough Victoria Northumberland and Clarington Catholic District School Board has reviewed the current estimates and designates \$X, as available for the purpose of acquiring school sites by purchase, lease, or other method."

4.0 TERMS AND DEFINITIONS

4.1 EDUCATION DEVELOPMENT CHARGES BY-LAW

The Education Act permits school boards to apply charges to new development to help pay for new school sites which are needed in order to accommodate students emanating from new development. Once enacted by a school board, the By-Law is the document which sets out types of development to which charges apply, level of charges, and provisions for collection by municipalities.

4.2 LONG TERM PLAN FOR PUPIL ACCOMMODATION

The Ministry of Education requires that, at a minimum of once every five years, school boards consider their pupil accommodation needs and prepare a Long Term Plan for meeting needs. Such Plans consider new facility requirements, as well as consolidation or school closure needs. The Plan is comprehensive, taking into account long term enrolment projections and provincial funding implications, while articulating evolving facility needs over the long term.

5.0 REFERENCES/RELATED DOCUMENTS

Ontario Planning Act
Ontario Regulation 20/98 (Education Development Charges)
Municipal Act, Section 210.1

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6.0 RELATED POLICIES

Policy 106, Alternative Arrangements for School Facilities
Policy 107, Subdivision and Residential Plan Review

7.0 RELATED FORMS

8.0 APPROVED BY BOARD

September 22, 2009

9.0 EFFECTIVE DATE

September 22, 2009

10.0 POLICY REVIEW DATE

September 2014

11.0 REVIEW BY

Business and Finance Services



BOARD POLICY	
Administrative Procedure Section FACILITIES	Policy Number 106
Administrative Procedure Number AP-FAC-106	Page 1 of 3

POLICY TITLE

Alternative Arrangements for School Facilities

1.0 PURPOSE

The Peterborough Victoria Northumberland and Clarington Catholic District School Board recognizes that alternate arrangements can provide an opportunity to improve service delivery, reduce duplication of public facilities, maximize cost effectiveness, and reduce site size requirements. This Policy sets out circumstances under which a review of alternative arrangements for school facilities is to be conducted as intended to meet requirements of the Education Act as they pertain to Education Development Charges and the need to consider alternative arrangements for school facilities.

2.0 POLICY

It is the policy of the Peterborough Victoria Northumberland and Clarington Catholic District School Board to conduct a review of alternative arrangements for school facilities at the time the Board's Long Term Plan for Pupil Accommodation is reviewed, or at the time any of the Board's Education Development Charges By-Laws are reviewed.

3.0 GUIDELINES

- 3.1 The Board plans for school facility needs through periodic review of its Long Term Plan for Pupil Accommodation and its Education Development Charges By-Laws. As part of the periodic review of these documents, the Board will consider alternative arrangements for school facilities as defined and detailed in the Administrative Procedure accompanying this Policy.

4.0 TERMS AND DEFINITIONS

4.1 EDUCATION DEVELOPMENT CHARGES BY-LAW

The Education Act permits school boards to apply charges to new development to help pay for new school sites which are needed in order to accommodate students emanating from new development. Once enacted by a school board, the By-Law is the document which sets out types of development to which charges apply, level of charges, and provisions for collection by municipalities.

4.2 LONG TERM PLAN FOR PUPIL ACCOMMODATION

The Ministry of Education requires that, at a minimum of once every five years, school boards consider their pupil accommodation needs and prepare a Long Term Plan for meeting needs. Such Plans consider new facility requirements, as well as consolidation or school closure needs. The Plan is comprehensive, taking into account long term enrolment projections and provincial funding implications, while articulating evolving facility needs over the long term.

5.0 REFERENCES/RELATED DOCUMENTS

Ontario Regulation 20/98 (Education Development Charges)
Ontario Regulation 446/98 (Reserve Funds)
Municipal Act, Section 210.1

6.0 RELATED POLICIES

Policy 107, Subdivision and Residential Plan Review
Policy 108, School Site Selection (Common Sites)

7.0 RELATED FORMS

8.0 APPROVED BY BOARD

September 22, 2009

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9.0 EFFECTIVE DATE

September 22, 2009

10.0 POLICY REVIEW DATE

September 2014

11.0 REVIEW BY

Business and Finance Services