

# **Mixed Use and Residential Intensification Community Improvement Plan**

**November 2016**



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# 1 INTRODUCTION

## 1.1 Background

The Town of Lincoln, with a current population of approximately 24,000, is a Greenbelt community in the Niagara Peninsula. Between 2001 and 2011, the Town experienced an increase in population and housing units of 8.9% and 14.1%, respectively. By comparison, over the same time period, Niagara Region experienced an increase in population and housing units of only 4.8% and 7.6%, respectively.<sup>1</sup> The Town of Lincoln is experiencing and will continue to experience significant population and housing growth<sup>2</sup>.

The Town of Lincoln includes the urban communities of Beamsville, Vineland, Jordan, Jordan Station, Prudhommes and Campden; and the hamlet of Tintern. All of the Town's urban communities are surrounded by specialty crop lands in the Greenbelt. The majority of growth in the Town will be directed to the three larger urban settlements of Beamsville, Vineland and Prudhommes.

In 2011, only 7.4% of the occupied private dwellings in the Town were apartments, compared to 19.7% of the occupied private dwellings in Niagara Region<sup>3</sup>. Furthermore, residential development in the Town has primarily been composed of low density and medium density in the form of single detached, semi-detached and townhouse units. Between 1995 and 2014, only 6% of the development activity in the Town was in the form of apartments or retirement type units in care facilities<sup>4</sup>. Yet, Provincial and Regional planning policy requires that at least 40% of all new residential units be in the built-up area. This means that approximately 900 new residential units will need to be constructed in the built-up area in Lincoln between 2015 and 2031.

The Town must promote residential intensification and more mixed use development if it is to meet this challenge. "Intensification" can be defined as development at a higher density than is currently being experienced. While intensification can take a variety of forms, including conversion of space within existing mixed use buildings, expansion of existing residential and mixed use buildings, infill development on vacant lots and redevelopment of existing buildings, the reality in Lincoln is that most intensification will necessarily take the form of infill development and redevelopment.

The Town has adopted a new Official Plan<sup>5</sup> that promotes the intensification of residential and employment areas by:

- i) Establishing intensification corridors along a portion of Ontario Street in Beamsville and along King Street in the Beamsville and Vineland Central Business Districts (CBDs) to promote and focus higher density mixed use development along these major arterial roads;

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<sup>1</sup> Source: Hemson Consulting Ltd. based on Statistics Canada Census of Population, 2001 & 2011.

<sup>2</sup> Source: Hemson Consulting Ltd., Table 7, page 18.

<sup>3</sup> Statistics Canada. 2011 Census Profile for Town of Lincoln and Regional Municipality of Niagara.

<sup>4</sup> Town of Lincoln Planning and Development Department.

<sup>5</sup> New Official Plan is awaiting approval from the Ontario Municipal Board.

- ii) Designating and zoning lands along and near the Intensification Corridors for medium and high density residential uses; and,
- iii) Designating and zoning lands along and near the Intensification Corridors for mixed use development to promote a range of housing units, including live-work units, as well as mixed commercial/residential uses that include small scale commercial uses.

## 1.2 Purpose

The primary purpose of the Mixed Use and Residential Intensification Community Improvement Plan (CIP) is to identify key community improvement needs related to promoting intensification and mixed use, and specify tools to help the Town encourage apartments and other forms of higher density housing as well as commercial/residential mixed-use to promote additional employment uses in the Town. This will help the Town become more vibrant and prosperous and help to ensure the sustainability of the Town's urban areas.

The Town of Lincoln retained RCI Consulting to prepare a Mixed Use and Residential Intensification CIP. RCI Consulting worked closely with senior Town staff, and consulted with senior Niagara Region staff, key stakeholders, the public and Town Council during the preparation of this plan.

This CIP:

- a) Outlines the legislative, policy and planning framework that supports the purpose of the CIP;
- b) Identifies the key community improvement needs based on an analysis of current and potential future land uses and mix, Official Plan designation, and level of community improvement need;
- c) Recommends an appropriate Community Improvement Project Area (Project Area) for the CIP;
- d) Specifies incentive programs that can be offered by the Town in cooperation with Niagara Region to directly stimulate private sector investment in the form of higher density residential and mixed use development/redevelopment projects in the Community Improvement Project Area; and,
- e) Outlines an Implementation Plan including a Monitoring Program and Marketing Strategy that will help the Town to implement and market the incentive programs contained within the Plan, monitor the results of these programs, and adjust them as required.

## 1.3 Study Area

The terms of reference established the "Study Area" for this CIP (see Figures A1 to A3)<sup>6</sup> in **Appendix A**. Ostensibly; this study area includes all lands in the urban communities of Beamsville, Vineland and Jordan that are:

- i) Along designated Intensification Corridors;
- ii) designated or zoned High Density or Medium Density Residential;

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<sup>6</sup> Maps A1 and A2 also display the existing Community Improvement Project Areas for the Beamsville and Vineland CIPs, respectively.

iii) designated Mixed Use.

The study area and properties adjacent to the study area were examined and evaluated to determine which lands are appropriate for inclusion in the Community Improvement Project Area for this CIP. This process and the resulting recommended Community Improvement Project Area is described in greater detail in Section 6.0 of this Plan.

The community improvement project area is designated by a by-law passed by Council and the CIP will apply to the designated community improvement project area.

## **1.4 General Methodology**

A number of tasks were completed in order to provide a comprehensive foundation for the preparation of the CIP. This included:

- a) A review of relevant legislation, and relevant Provincial, Regional and Town planning and policy documents;
- b) A community improvement needs analysis including an assessment of the planning and land use characteristics and potential for infill, redevelopment and other forms of intensification in the study area based on walking tours of the study area, input received from senior Town staff, Council, key stakeholders and the public during and after the first public workshop session held on May 9, 2016;
- c) A review of best practices utilized by other Ontario municipalities looking to promote residential intensification and mixed use along their intensification corridors and in their downtowns and commercial core areas;
- d) Use of the outputs of Tasks a) to c) above to prepare draft incentive programs;
- e) Refinement of the draft incentive programs based on input received from senior Town staff, Council, key stakeholders and the public during and after a second public workshop session held on June 21, 2016; and,
- f) Preparation of this final plan.

## **1.5 Report Content**

This report is divided into the following sections.

- Section 2.0 provides a review of the legislative framework for the CIP.
- Section 3.0 provides a review of the policy, planning and other background documents that are applicable to the CIP.
- Section 4.0 contains a summary of the consultation taken with various stakeholders during preparation of the plan.
- Section 5.0 contains a summary of the community improvement needs analysis and goals.
- Section 6.0 defines the recommended Community Improvement Project Area for the CIP.

- Section 7.0 contains the municipal incentive programs specifically designed to help promote higher density residential intensification and mixed use in the Project Area.
- Section 8.0 contains a monitoring program designed to assist the Town in monitoring progress on implementation of the CIP and the economic and other impacts of the programs contained in the CIP.
- Section 9.0 contains a marketing strategy for the CIP.
- Section 10.0 contains an implementation strategy that outlines the priorities and timing for implementation of the incentive programs in this CIP.
- Finally, Section 11.0 provides a brief conclusion to the CIP.

## 2.0 LEGISLATIVE FRAMEWORK

This section of the report reviews the legislative authority for preparation and adoption of community improvement plans by municipalities in Ontario.

### 2.1 Municipal Act, 2001

Section 106 (1) and (2) of the *Municipal Act, 2001* prohibits municipalities from directly or indirectly assisting any manufacturing business or other industrial or commercial enterprise through the granting of bonuses. Prohibited actions include giving or lending any property of the municipality, including money; guaranteeing borrowing; leasing or selling any municipal property at below fair market value; and giving a total or partial exemption from any levy, charge or fee.

This prohibition is generally known as the “bonusing rule”. Section 106 (3) of the *Municipal Act, 2001* provides an exception to this bonusing rule for municipalities exercising powers under Subsection 28 (6), (7) or (7.2) of the *Planning Act* or under Section 365.1 of the *Municipal Act, 2001*. It is this exception under Section 28 of the *Planning Act* that allows municipalities with enabling provisions in their official plans to prepare and adopt Community Improvement Plans (CIPs). CIPs provide municipalities with a comprehensive framework for the planning and provision of economic development incentives in areas requiring community improvement.

Section 365.1 of the *Municipal Act, 2001* operates within the framework of Section 28 of the *Planning Act*. A municipality with an approved CIP in place that contains provisions specifying tax assistance for environmental remediation costs will be permitted to provide said tax assistance for municipal property taxes. Municipalities may also apply to the Province to provide matching education property tax assistance through the Province’s Brownfields Financial Tax Incentive Program (BFTIP).

Section 107 of the *Municipal Act, 2001* describes the powers of a municipality to make a grant, including the power to make a grant by way of a loan or guaranteeing a loan, subject to Section 106 of the *Municipal Act, 2001*. In addition to the power to make a grant or loan, these powers also include the power to sell or lease land for nominal consideration or to make a grant of land; provide for the use by any person of land owned or occupied by the municipality upon such terms as may be fixed by Council; sell, lease or otherwise dispose of at a nominal price, or make a grant of any personal property of the municipality or to provide for the use of the personal property on such terms as may be fixed by Council.

In order to encourage good stewardship, maintenance and conservation of locally designated heritage properties, municipalities may, under Section 365.2 of the *Municipal Act, 2001*, pass a by-law to establish a local Heritage Property Tax Relief (HPTR) Program to provide tax relief (10 to 40 per cent) to owners of eligible heritage properties, subject to an agreement, to protect the heritage features of their property. This financial tool is designed to help owners of heritage properties maintain and restore their properties. An eligible heritage property for this Program is a property or portion of a property that is designated under Part IV of the *Ontario Heritage Act* or is part of a



heritage conservation district under Part V of the *Ontario Heritage Act* and that is subject to a heritage easement agreement. The Province shares in the cost of the Program by funding the education portion of the property tax. Municipalities that adopt the HPTR Program contribute to the Program by funding their portion of the tax.

## 2.2 Planning Act

Section 28 of the *Planning Act* allows municipalities with provisions in their official plans relating to community improvement to designate by by-law a “community improvement project area” and prepare and adopt a community improvement plan for the community improvement project area. Once the community improvement plan has been adopted by the municipality and comes into effect, the municipality may exercise authority under Section 28(6), (7) or (7.2) of the *Planning Act* or Section 365.1 of the *Municipal Act, 2001* in order that the exception provided for in Section 106 (3) of the *Municipal Act, 2001* will apply.

According to Section 28 (1) of the *Planning Act*, a “community improvement project area” is defined as “a municipality or an area within a municipality, the community improvement of which in the opinion of the council is desirable because of age, dilapidation, overcrowding, faulty arrangement, unsuitability of buildings or for any other environmental, social or community economic development reason”. It is important to note that there are a variety of reasons that an area can be designated as an area in need of community improvement. The criteria for designation cover physical deterioration, faulty arrangement, unsuitability of buildings and any other social or community economic development reasons.

Section 28 (1) of the *Planning Act* defines “community improvement” as “the planning or replanning, design or redesign, resubdivision, clearance, development or redevelopment, construction, reconstruction and rehabilitation, improvement of energy efficiency, or any of them, of a community improvement project area, and the provision of such residential, commercial, industrial, public, recreational, institutional, religious, charitable, or other uses, buildings, structures, works, improvements or facilities, or spaces therefore, as may be appropriate or necessary”. This represents a wide range of possible municipal actions.

Once a CIP has come into effect, the municipality may:

- i) Acquire, hold, clear, grade or otherwise prepare land for community improvement (Section 28 (3) of the *Planning Act*);
- ii) Construct, repair, rehabilitate or improve buildings on land acquired or held by it in conformity with the community improvement plan (Section 28 (6));
- iii) Sell, lease, or otherwise dispose of any land and buildings acquired or held by it in conformity with the community improvement plan (Section 28 (6)); and
- iv) Make grants or loans, in conformity with the community improvement plan, to registered owners, assessed owners and tenants of land and buildings within the community improvement project area, and to any person to whom such an owner or tenant has assigned the right to receive a

grant or loan, to pay for the whole or any part of the eligible costs of the community improvement plan (Section 28 (7)).

Section 28 (7.1) of the *Planning Act* specifies that the eligible costs of a community improvement plan for the purposes of Subsection 28 (7) may include costs related to environmental site assessment, environmental remediation, development, redevelopment, construction and reconstruction of lands and buildings for rehabilitation purposes or for the provision of energy efficient uses, buildings, structures, works, improvements or facilities.

Section 28 (7.3) of the *Planning Act* specifies that the total of all grants and loans made in respect of particular lands and buildings under Section 28 (7) and (7.2) of the *Planning Act* and tax assistance provided under Section 365.1 of the *Municipal Act, 2001* in respect of the land and buildings shall not exceed the eligible cost of the community improvement plan with respect to those lands and buildings.

Section 28(11) of the *Planning Act* allows a municipality to register an agreement concerning a grant or loan made under subsection 28(7) or an agreement entered into under subsection 28(10) against the land to which it applies and the municipality shall be entitled to enforce the provisions thereof against any party to the agreement and, subject to the provisions of the *Registry Act* and the *Land Titles Act*, against any and all subsequent owners or tenants of the land.

Section 69 of the *Planning Act* allows municipalities to reduce or waive the amount of a fee in respect of a planning application where it feels payment is unreasonable. Municipalities can use this tool to waive all matter of planning application fees to promote community improvement without inclusion in a CIP. Alternatively, a municipality can collect fees and then provide a partial or total rebate of fees in the form of a grant, but this must be done within a CIP.

## 2.3 Ontario Heritage Act

The purpose of the *Ontario Heritage Act* is to give municipalities and the provincial government powers to conserve, protect and preserve heritage buildings and archaeological sites in Ontario. While the heritage property tax relief program under Section 365.2 (1) of the *Municipal Act, 2001* is designed to assist property owners in maintaining and conserving heritage properties, Section 39 (1) of the *Ontario Heritage Act* allows the council of a municipality to make grants or loans (up-front or tax-increment basis) to owners of designated heritage properties to pay for all or part of the cost of alteration of such designated property on such terms and conditions as the council may prescribe. In order to provide these grants and loans, the municipality must pass a by-law providing for the grant or loan.

Grants and loans for heritage restoration and improvement can also be provided under a CIP. One of the key administrative advantages of Section 39 of the *Ontario Heritage Act* is that it requires only passing of a by-law by the local council rather than the formal public meeting process under Section 17 of the *Planning Act* required for a CIP. One of the disadvantages of the *Ontario Heritage Act* is

that unlike the *Planning Act*, it does not allow municipalities to make grants or loans to assignees, e.g., tenants who may wish to undertake heritage improvements.

Another advantage of the *Ontario Heritage Act* is that interpretation of Section 39 (1) of the *Heritage Act* suggests that this section does not restrict grants and loans only to heritage features. Section 39 (1) of the *Ontario Heritage Act* refers to "...paying for the whole or any part of the cost of alteration of such designated property on such terms and conditions as the council may prescribe." Consultations with provincial staff and legal experts have confirmed that this section of the Act does not restrict grants and loans only to heritage features.

Section 39 (1) of the *Ontario Heritage Act* can also be used to provide grants and loans for the undertaking of professional design studies as these can be considered "part of the cost of alteration". A design study is certainly an important precursor to, and key component of, any major heritage feature alteration. Section 39 (2) of the *Ontario Heritage Act* allows the council of a municipality to add the amount of any loan (including interest) to the tax roll and collect said loan in the same way that taxes are collected, for a period of up to 5 years. This section of the Act also allows the municipality to register the loan as a lien or charge against the land.

## **2.4 Development Charges Act**

Section 5 of the *Development Charges Act* allows a municipality to exempt a type(s) of development from a development charge, but any resulting shortfall cannot be made up through higher development charges for other types of development. This allows upper and lower tier municipalities to offer partial or total exemption from municipal development charges in order to promote community improvement such as downtown redevelopment, brownfield redevelopment or intensification in core areas. Because this financial incentive is normally offered before construction, i.e., at the time of building permit issuance, it is a very powerful community improvement tool.

## 3.0 POLICY REVIEW

This section of the report outlines the provincial, regional and town planning policies that are relevant to the CIP.

### 3.1 Provincial Policy Statement, 2014

The Provincial Policy Statement (the “PPS”) is issued under Section 3 of the *Planning Act* and provides direction on matters of provincial significance related to land use planning and development. Section 3 of the *Planning Act* requires that, “decisions affecting planning matters shall be consistent with policy statements issued under the Act”.

The Province of Ontario released the latest version of the PPS on February 24, 2014 and the policies took effect on April 30, 2014. The vision for land use planning in Ontario in the PPS states that “the long-term prosperity and social well-being of Ontarians depends on planning for strong sustainable communities for people of all ages, a clean and healthy environment, and a strong competitive economy”. To this end, the PPS promotes:

- Efficient development and land use patterns, appropriate mixes of different land use types, cost-effective development patterns and standards, environmentally sensitive development practices, accessible neighbourhoods, and available infrastructure and public facilities (Section 1.1.1);
- Opportunities for intensification and redevelopment where this can be accommodated taking into account existing building stock or areas, including brownfield sites, and the availability of suitable existing or planned infrastructure and public service facilities required to accommodate projected need (Section 1.1.3.3);
- An appropriate range of housing types and densities that accommodate current and future users, that efficiently use the land, services and facilities, and that support alternative transportation modes to the automobile, such as public transit (Section 1.4.3);
- Healthy, active communities with streets, parks, public spaces and trails that are pedestrian and cyclist-friendly and contain a range of different recreation opportunities (Section 1.5.1);
- Long-term prosperity through the maintenance and enhancement of downtown and mainstreets (Section 1.7.1c);
- Encouraging a sense of place, by promoting well-designed built form and cultural planning, and by conserving features that help define character, including built heritage resources and cultural heritage landscapes (Section 1.7.1 d);
- Sustainable tourism development (Section 1.7.1 g); and
- Conservation of significant built heritage and cultural heritage resources (Section 2.6.1).

### 3.2 Greenbelt Plan and Growth Plan for the Greater Golden Horseshoe

The Growth Plan for the Greater Golden Horseshoe (“Growth Plan”), released in 2006, is the Province of Ontario’s growth strategy for the Greater Golden Horseshoe region, which was completed under the “Places to Grow” initiative, including the Places to Grow Act, 2005. The Growth Plan is identified as *“a framework for implementing the Government of Ontario’s vision for building stronger, more prosperous communities by managing growth in the region to 2031”*. The Niagara Region is included within the Growth Plan’s area.

The Growth Plan provides an overall growth strategy for the region that complements the Provincial Policy Statement and is implemented primarily by municipal planning documents and other municipal tools. The Growth Plan seeks to building vibrant and compact communities that protect and enhance natural resources, support a strong and competitive economy, and optimize the use of new and existing infrastructure.

Within the Growth Plan the majority of the land within the Town of Lincoln is located within the broader “Greenbelt Area” designation (from the Province’s Greenbelt Plan), which precludes urban development. However, Beamsville, Vineland and Jordan are identified as “Towns and Villages” in the Greenbelt Plan. Policy 3.4.2 of the Greenbelt Plan states that municipalities are encouraged to continue their efforts to support the long-term vitality of these settlements through appropriate planning and economic development approaches which seek to maintain, intensify and/or revitalize these communities

Portions of Beamsville and Vineland are “Built-up Areas” as per the Growth Plan. The Growth Plan in respect to land within the Built-up Area boundary generally promotes:

- Building “compact, vibrant and complete communities” (Section 1.2.2);
- The planning of high density residential and employment uses to support public transit planning (Section 3.2.3a);
- The creation of pedestrian and cyclist-friendly environments in new communities, which are linked to other neighbourhoods and destinations (Section 3.2.4);
- The creation of a connected open space system (Section 4.2.1.4);
- Promotes the use of land use patterns and urban design standards that facilitate energy efficiency (Section 4.2.4.1b);
- The conservation of built and cultural heritage resources as the built up area intensifies (Section 4.2.4.1e).

The Growth Plan requires that at least 40% of all new residential growth in Niagara Region by 2015, and annually thereafter, is to be through intensification within the Built-up Area boundary in the Region, which includes the study area.

### 3.3 Niagara Region Official Plan

The Regional Municipality of Niagara Official Plan (the “Regional Official Plan”) provides the strategic direction for all land use decisions in Niagara. The Regional Official Plan outlines the Niagara Region’s planning goals and priorities for a vibrant and sustainable community, and outlines specific strategies and policies to help achieve that vision.

The study area is identified as “Urban Area” in the Regional Official Plan. Urban areas in the Region are intended to accommodate a broad range of urban uses that serve residents in the community, including commercial, residential, industrial, open space and institutional uses.

The policies of Section 4 of the Regional Official Plan, Managing Growth, identify seven strategic objectives for the Niagara Region. These objectives and their supporting policies are designed to preserve and enhance Niagara’s unique characteristics and quality of life, while achieving a balance between accommodating growth and development and conserving resources and protecting the environment. A number of these objectives are relevant to the subject CIP’s preparation, including:

- Directing the majority of growth and development to Niagara’s existing Urban Areas;
- Direct a significant portion of Niagara’s future growth to the Built-up Area through intensification;
- Build compact, mixed use, transit supportive, active transportation friendly communities in the Built-up Area and in Designated Greenfield Areas;
- Reduce dependence on the automobile through the development of compact, mixed use, transit supportive, active transportation friendly urban environments; and,
- Provide a framework for developing complete communities all across Niagara, including a diverse mix of land uses, a range of local employment opportunities and housing types, high quality public open spaces, and easy access to local stores and services via automobile, transit and active transportation.

Section 4.C of the Regional Official Plan promotes intensification. Section 4.C.4 sets out minimum residential intensification targets for Niagara’s local municipalities. The minimum intensification target for the Town of Lincoln is 40% of annual residential units through intensification. Policy 4.C.2.1 of the Regional Official Plan specifies that each local municipality will develop and implement through its local official plan and other supporting documents, a strategy and policies for promoting intensification and achieving the intensification targets. Policy 4.C.2.1 also indicates that Local official plans will:

- Identify specific Intensification Areas to support the achievement of the intensification targets, including downtowns, intensification nodes and corridors and strategically located brownfield and greyfield areas;
- Plan Intensification Areas to provide a diverse mix of land uses that complement and support the overall residential intensification objective;

- Plan each Intensification Area to achieve higher densities than currently exist within the Intensification Area. It is expected that Intensification Areas will generally achieve higher densities than the surrounding areas;
- Ensure that Intensification Areas provide appropriate densities and transitional areas to ensure relative compatibility with surrounding neighbourhoods, including the use of minimum and maximum heights and densities;
- Identify opportunities for providing affordable housing within Intensification Areas; and,
- Make use of other tools, such as the Region's Model Urban Design Guidelines, Alternative Development Standards, Development Permit Systems or **Community Improvement Plans** to facilitate growth and development within Local Municipally Designated Intensification Areas.

Policy 14.F.1 of the Regional Official Plan notes that the Region may establish programs for the provision of grants and loans to local municipalities for the purpose of achieving the goals of Community Improvement Plans.

### 3.4 Regional GO Mobility Transit Hub and Transit Stations Study

Niagara Region, in partnership with the municipalities of Grimsby, Lincoln, St. Catharines and Niagara Falls, and in consultation with Metrolinx, is undertaking a GO Mobility Transit Hub and Transit Stations Study. The study began in January of 2016 and will support the introduction of two-way GO train service between Niagara Falls and Hamilton.

Beamsville is identified as a 'future potential' GO train station, as per the 2011 Niagara Rail Service Expansion Environmental Study Report. The GO Mobility Transit Hub and Transit Stations Study will include the preparation of Secondary Plans for the areas around mobility hubs. It is anticipated that an increase in density in the area surrounding the future transit site in Beamsville will be required to support a transit station. The development of lands at higher densities in other areas of the Town will also support this key transit initiative.

### 3.5 Smarter Niagara Programs

The Region has defined a vision for urban growth and community redevelopment and revitalization through its Smart Growth initiative, Smarter Niagara. The Region's Smart Growth initiative is defined through ten principles and an associated list of supporting criteria. These ten principles, all of which apply directly or indirectly to this CIP, are:

- 1) Create a mix of land uses;
- 2) Promote a compact built form;
- 3) Offer a range of housing opportunities and choices;
- 4) Produce walkable neighbourhoods and communities;
- 5) Foster attractive communities and a sense of place;
- 6) Preserve farmland and natural resources;
- 7) Direct development to existing communities;



- 8) Provide a variety of transportation choices;
- 9) Make development predictable and cost effective; and
- 10) Encourage community stakeholder collaboration.

A key component of the Smarter Niagara initiative is the Smarter Niagara Incentive Programs, which were endorsed by Regional Council in 2002. These programs underwent a major review and update in 2011 and revisions to the programs were approved by Council in November of 2011. The Region has established that it will provide a matching proportionate share of financial incentive programs offered by an area municipality through a CIP, subject to a maximum share from the Region as specified in the Smarter Niagara Incentive Programs. The Smarter Niagara Incentive Programs are described in **Appendix B**.

Efforts have been ongoing to implement these programs since 2002 and the Region has budgeted considerable funds for the implementation of these programs. The Region and area municipalities in Niagara have established a Region/Area Municipality Incentive Coordinating Committee to coordinate the provision of these incentives through local community improvement plans.

The Region has also developed Smart Growth Design Criteria that are used by Regional staff to determine if development projects within community improvement project areas or on brownfield sites are eligible for an additional Regional development charge reduction.

### **3.6 Town of Lincoln Future Focus Corporate Plan**

Town of Lincoln Council has adopted a Future Focus Corporate Plan for 2014-2018, including a Work Plan to help implement the Future Focus Corporate Plan. A number of the strategic directions in the Future Focus Corporate Plan can be readily supported by this CIP. These include:

- Promote development of downtown business districts making them “market ready”;
- Attract investment and creative talent through growing local business, boosting tourism, and enhancing community image; and,
- Promote adaptive reuse for downtown revitalization.

### **3.7 Town of Lincoln Official Plan**

The Town of Lincoln Official Plan (the “Official Plan” or “OP”) was adopted by Town Council in 1990 and approved by the Ministry of Municipal Affairs in 1992, with the stated purpose of providing a *“comprehensive framework to guide and direct future growth, development and redevelopment of lands”* within the Town. In 2014, Lincoln Town Council adopted a new Official Plan which was approved by the Region in 2015. At the time of writing of this CIP, the new Official Plan has been appealed to the Ontario Municipal Board. However, the lone remaining appeal deals with environmental resource policies that do not impact lands within the study area for this CIP. Therefore, the relevant sections in the new Official Plan are reviewed below.



### **3.7.1 Community Vision and Sustainability**

A sustainable community balances social well-being, resource protection, economic opportunities and environmental responsibility to meet the needs of the present without compromising the quality of life for future generations. In Lincoln, sustainability is linked to the vision of being a Centre of Excellence for Agriculture where the outstanding agricultural land base is the foundation for a vibrant and progressive local economy. Section 1.2 of the Official Plan indicates that decisions relating to land use, public works and capital expenditures shall be made with consideration for this vision and for the long-term well-being of the community, the economy and the environment. Section 1.2 of the Official Plan also notes that the goal of being a sustainable community is achieved by:

- Providing choices and opportunities for housing, employment, transportation, social, recreational and cultural amenities;
- Making efficient use of its infrastructure by focusing on a compact, mixed-use, walkable, bikeable and connected community;
- Having vibrant downtowns and attractive public spaces;
- Promoting urban design guidelines to ensure a high quality of building and site design;
- Encouraging design practices that address the accessibility needs of residents with disabilities;
- Identifying specific opportunities for promoting energy conservation and reducing waste; and,
- Promoting the adaptive re-use of existing buildings and structures and the redevelopment of brownfields and greyfields.

### **3.7.2 Goals and Objectives**

Section 1.3 of the Official Plan specifies a number of goals and objectives, several of which are directly relevant to and influence this CIP. These are:

- To accommodate new and innovative housing types within and in proximity to the Central Business Districts;
- To encourage local employment so residents can work in close proximity to home;
- To improve the economic health of the Central Business Districts by encouraging redevelopment and a broad mix of compatible uses;
- To encourage the development of neighbourhoods which support active transportation and provide a range and mix of housing types and densities, community facilities, neighbourhood commercial centres and public open spaces;
- To facilitate the provision of a full range of goods and services to meet the needs of residents and visitors;
- To support active transportation such as walking and biking as a means to attract investment in the community;
- To actively encourage the development of additional employment and retail and service commercial uses in the Central Business Districts;
- To provide for housing that is affordable to the community;

- To encourage diversity in housing in an effort to accommodate the broadest range of income levels;
- To reinforce the function of the Central Business District areas as the primary business, entertainment and commercial focal points of the community; and,
- To encourage intensification and redevelopment within the Urban Area specifically within and in proximity to the Central Business Districts.

### **3.7.3 Concepts Guiding Future Development in Urban Areas**

Section 1.6 of the Official Plan clearly recognizes that the Province of Ontario and the Region took a strong leadership role in not only directing more growth to existing settlement areas but also in requiring that the development and utilization of urban areas occur in a more sustainable and efficient manner. In recognition of this Provincial and Regional policy direction, Section 1.6 of the Official Plan contains policies on intensification and intensification corridors.

#### **3.7.3.1 Intensification**

“Intensification” is defined in the Official Plan as “developing urban lands at a higher density than currently exists through redevelopment, infilling, using vacant or underutilized land or expansion of existing buildings.” Section 1.6 of the Official Plan notes that intensification of residential and employment areas will be encouraged since it offers opportunities for economic development and takes advantage of already serviced but underutilized land and helps to improve the vibrancy of existing areas. Intensification is encouraged within the built-up area. However, strategic locations for intensification should be focused within the Central Business District Areas and Intensification Corridors within the Town.

Regional planning policy has allocated a future intensification target for the Town of Lincoln of 40% within the built-up area which equates to approximately 900 new units. This target is to be accommodated between 2015 and 2031. To this end, the Official Plan identifies potential intensification areas and articulates policies that provide guidance and direction with respect to intensification, specifically Section 3.1.13 of the Official Plan

#### **3.7.3.2 Intensification Corridors**

The Official Plan defines “Intensification Corridors” as areas along major roads that have the potential to provide a focus for higher-density and mixed use development. The Official Plan identifies the Central Business Districts along King Street in Beamsville and Vineland and the Ontario Street Commercial Area as Intensification Corridors” (see Appendix A). The Official Plan also contains urban design guidelines specifically for these areas, not only in the interest of better utilizing land and buildings, but to do so in a way that creates a high quality urban environment that provides diversity in housing and commerce.

### 3.7.3.3 Residential Development Policies

The residential development policies in Section 3.1.5 of the Official Plan guide housing type and density. Vacant residential lands have been designated as Low Density Residential, Medium Density Residential or High Density Residential in accordance with Schedule 'A' and the Secondary Plan Schedule 'B' of the Official Plan. These land use designations are then implemented through the Zoning By-law. Table 1 below shows the minimum and maximum densities and maximum height established in the Official Plan for the various residential designations.

**Table 1 Residential Densities and Heights – Town of Lincoln Official Plan**

Land Use Designation	Minimum Density (units per net ha.)	Maximum Density (units per net ha.)	Maximum Height (Storeys)
Low Density Residential (single detached, semi-detached, duplexes and townhouses)	10	25	na
Medium Density Residential (block townhouses, street townhouses, low-rise apartments and other forms of multi-unit residential uses)	25	60	3 <sup>1</sup>
High density Residential (townhouses, apartments and other forms of multi-unit residential uses)	50	120 <sup>2</sup>	6 <sup>1</sup>

Notes:

<sup>1</sup> Unless a higher height is permitted in an approved Secondary Plan.

<sup>2</sup> Unless a higher density is permitted in an approved Secondary Plan.

na – see Zoning By-law.

### 3.7.3.4 Residential Intensification

Section 3.1.13 of the Official Plan contains policies on residential intensification. In accordance with Provincial and Regional policies, the Town will accommodate at least 40% of projected housing growth annually, or about 900 residential dwelling units, within the existing built-up area. "Residential intensification" is defined as the development or redevelopment of existing vacant land or underutilized land within existing urban areas into building types that more efficiently use existing urban space and services.

The Official Plan identifies a number of areas that may be good candidates for residential intensification. The areas are designated as Medium Density Residential and High Density Residential on Schedules 'A' and 'B' of the Official Plan. The Official Plan also notes that this does not preclude consideration of other sites in the Residential designation for intensification provided intensification and redevelopment proposals achieve a unit density and housing type that is in keeping with the character, density and building heights of the neighbourhood where it is proposed. Finally, the Official Plan requires that all residential intensification within the Residential designation conform to the urban design policies in the Official Plan and be subject to site plan control.

### **3.7.3.5 Mixed Use and Commercial Designations**

The Mixed Use designation recognizes transition areas between adjacent stable residential neighbourhoods and the Central Business Districts which contain a mixture of residential uses, live-work units and small scale commercial uses. The objective of the Mixed Use designation is to accommodate intensification in the form of low and medium density residential, mixed use commercial and residential uses and small scale commercial uses. Mixed use areas are to be developed in a linear or nodal form, in a compact manner, either as stand-alone uses or in mixed use buildings and mixed use areas are to be pedestrian oriented and transit supportive. The maximum height of buildings in the Mixed Use area is limited to three (3) storeys. All development within the Mixed Use Residential designation must conform to the urban design policies in the Official Plan and be subject to site plan control.

The Central Business District is where retail, office, specialized and service uses are focused. The Central Business District is considered a mixed use node. The principal Central Business Districts of the community are the Central Business Districts of Beamsville, Vineland and Jordan. The objective of the Central Business District designation is to: encourage a diverse mix of commercial, residential, cultural and social uses that will enhance business and commercial activities within the Town; foster a vibrant, connected, walkable and bikeable retail and commercial environment; and promote opportunities for mixed use development in strategically located nodes and corridors. To assist in the revitalization of the Central Business Districts, the Official Plan encourages new residential development in the form of apartment buildings, street or block townhouses and units above commercial buildings.

The General Commercial designation is also considered a mixed use node and corridor. To assist in the revitalization of the General Commercial areas, new residential development in the form of apartments above a commercial use is encouraged. The objective of the General Commercial designation is to: encourage the provision of a sufficient level and variety of retail activity within the Town to satisfy the consumer demands of residents; foster a vibrant, connected, walkable and bikeable retail and commercial environment; and promote opportunities for mixed use development in strategically located nodes and corridors.

### **3.7.3.6 Urban Design Principles**

Section 8.6 of the Official Plan notes that because the Town has fixed Urban Area Boundaries, future growth in the Town will occur primarily through intensification and redevelopment. This requires design to be sensitive to ensure compatibility and to create a sense of place. Therefore, development in the Town will be based on a number of design principles: Many of these design principles provide direction for this CIP, including:

- a) Encouraging a compact, walkable and well-connected community;
- b) Encouraging mixed use and a range of housing;

- c) Encouraging quality architecture and to ensure that buildings provide an appropriate edge to the street;
- d) Encouraging increased density in appropriate locations;
- e) Providing a range of transportation options, including walking and cycling;
- f) Encouraging complete streets for all users;
- g) Encouraging a strong sense of place;
- h) Encouraging new development that is compatible with established development; and,
- i) Protecting the heritage buildings and structures.

### **3.7.3.7 Community Improvement**

Section 8.4 of the Official Plan contains the Town's policies on Community Improvement Plans. This section of the Official Plan provides considerable detail and ensures that the Town can implement a range of incentive programs, policies and municipal actions as part of any CIP. This section of the Official Plan also aligns with Regional and Provincial policies. A summary description of the key aspects of Section 8.4 of the Official Plan is provided below and a copy of Section 8.4 of the Town of Lincoln Official Plan is contained in **Appendix C**.

Section 8.4.1 (Introduction) clearly specifies that the Town may designate community improvement project areas and prepare community improvement plans (CIPs) for those areas.

Section 8.4.2 (Objectives) sets out a number of objectives for which the Town may prepare and adopt CIPs. Several of these objectives apply to this CIP including the revitalization and redevelopment of downtowns, supporting implementation of the Town's growth management policies, encouraging infill, intensification and redevelopment, supporting active transportation, improving the supply of affordable housing and range of housing opportunities, and encouraging and supporting environmentally sustainable development.

Section 8.4.3 sets out criteria that must be present for designation of a community improvement project area with the requirement that at least one of the specified criteria must be satisfied. The recommended Community Improvement Project Area for this CIP satisfies almost all of the criteria for designation of a community improvement project area.

Section 8.4.3 also sets out the priorities for phasing of CIPs and the range of actions that the Town can take to implement a CIP. This includes the full range of actions permitted under Section 28 of the *Planning Act*.

Finally, Section 8.4.4 specifies the general contents of a CIP and that the preparation of a CIP shall meet the minimum requirement of the *Planning Act* for public consultation.

### 3.7.3.8 Summary of Key Goals in the Official Plan

Based on the above-noted review of the Town's new Official Plan, one of the primary goals of the new Official Plan is to encourage intensification in the form of higher density residential development and more higher density mixed use development in appropriate locations. This can be accomplished through redevelopment, infilling, using vacant or underutilized land or expansion of existing buildings. To help achieve this goal, the Town has designated in its new Official Plan:

- i) Intensification Corridors in the Central Business Districts in Beamsville and Vineland and the Ontario Street Commercial Area;
- ii) Lands for High Density Residential and Medium Density Residential use next to and within the Central Business Districts in Beamsville and Vineland; and,
- iii) Mixed Use areas in Beamsville and Jordan that promote a range of housing units as well as live-work units and small scale commercial uses.

Furthermore, numerous policies in the new Official Plan and the applicable Secondary Plans direct that intensification and mixed use in these areas also help to achieve the goal of being a sustainable community by:

- a) Being sustainable, compact, mixed-use, walkable, bikeable, transit supportive and connected;
- b) Being well designed, including accessibility, and high quality building and site design that also promotes energy conservation and reduces waste; and,
- c) Offering choices and opportunities for housing, employment, transportation, social, recreational and cultural amenities.

## 4.0 CONSULTATION

### 4.1 Stakeholder Workshop #1

The first Stakeholder Workshop was held on May 9, 2016. The purpose of this meeting was to:

- a) Provide the community with an overview of the process of preparing a CIP;
- b) Present the background and rationale for the CIP, including the intensification and mixed use goals in the Official Plan;
- c) Present and receive input on the community improvement needs in the study area;
- d) Review incentive program best practices in other municipalities, including the use of intensification and mixed use targets and performance criteria; and,
- e) Present and obtain input on preliminary incentive program concepts designed to help promote higher density residential and mixed use development in the study area.

Approximately 15 people attended the first Stakeholder Workshop session. Attendees included business and property owners and residents. Following an information presentation by the consultant, almost all the attendees stayed for the Workshop session where the attendees were divided into two working groups and asked to discuss and answer the following questions:

1. What minimum intensification and mixed use targets should the incentive programs include?
2. What key performance criteria should the incentive programs include?
3. What types of financial incentive programs do you think would work best to promote higher density residential development and higher density mixed use development?
4. Any other ideas/suggestions for achieving the community improvement goals and objectives?

Attendees were also provided with a comment sheet and invited to provide written comments. One written comment was received. Comments made at the first workshop and received in response to the above-noted questions were reviewed and used to finalize the community improvement needs and goals identified in Section 5.0 of this CIP, and develop draft incentive programs which would be subject to input during the second workshop.

Some of the most frequently mentioned comments at the first Workshop included:

- The Community Improvement Project Area should not be limited only to properties currently designated medium/high density residential and mixed use. Properties redesignated in the future to medium/high density residential or mixed use should be included in the Community Improvement Project Area and be eligible to apply for available incentive program.
- The preferred type of incentive program is a development charge grant, followed by a tax increment grant.
- Projects that are mixed use should have reduced minimum residential density requirements.
- The most important performance criteria are those related to building design, site design and architecture. There was less importance placed on sustainability criteria.

- The performance criteria should be fairly easy to understand and should contain primarily design criteria plus some sustainability criteria.

## 4.2 Economic Development and Planning Committee Presentation #1

A presentation was also made to the Economic Development and Planning (ED&P) Committee of Council on May 9, 2016. This presentation included a project update and summary of the comments received at the Stakeholder Workshop held earlier that day. General comments received from the ED&P Committee of Council included:

- Strong support for the idea of performance standards;
- Emphasis on design and ensuring development in the form of intensification is complementary to existing development;
- Strong support for the inclusion of affordable housing as one of the incentive program performance criteria
- The incentive programs in this CIP should be fairly easy to understand;
- The incentive programs available for intensification and mixed use should be similar to those available in the Beamsville and Vineland CIPs; and,
- The incentive programs in this CIP must reconcile with those in existing CIPs, i.e., the Beamsville Commercial Core and Ontario Street Corridor CIP and the Vineland CIP.

These comments from the ED&P Committee of Council were also taken into consideration during the preparation of the draft incentive programs.

## 4.3 Stakeholder Workshop #2

The second Stakeholder Workshop was held on June 21, 2016. The purpose of this meeting was to:

- a) Provide a project update;
- b) Present a summary of the comments received during and after the first workshop; and,
- c) Present and obtain input on draft incentive programs, including minimum intensification and mixed use targets and performance criteria based application evaluation framework.

Approximately 14 people attended the second Workshop session. Attendees included business and property owners and residents. Following an update presentation by the consultant, almost all the attendees stayed for the Workshop session where attendees were asked to provide comment on the types of incentive programs, minimum intensification and mixed use targets and performance criteria being proposed.

Overall, the comments received at the second Workshop were very supportive of the proposed incentive programs. Most comments were focused on issues such as design and architectural control as these relate to intensification. A few suggestions for minor revisions to the density/height and mixed use targets were also made. The input obtained at the second Workshop was utilized to refine and finalize the Incentive Programs contained in this CIP.



#### **4.4 Economic Development and Planning Committee Presentation #2**

A presentation was then made to the Economic Development and Planning (ED&P) Committee of Council on June 29, 2016. This presentation included a project update, the draft incentive programs and a summary of the comments received at the second Workshop held on June 21<sup>st</sup>. Comments received from the ED&P Committee of Council were very supportive of the draft incentive programs.

## 5.0 COMMUNITY IMPROVEMENT NEEDS AND GOALS

### 5.1 Purpose

An analysis of the Study Area and nearby lands was conducted to gain an understanding of the key community improvement issues and needs. This analysis provides a key foundation for the preparation of this CIP, including the goals of the CIP and the incentive programs contained in this CIP designed to help achieve the goals of the CIP.

### 5.2 Methodology

The analysis of community improvement needs started by identifying key community improvement needs in the Study Area based on a review of relevant planning and policy documents, especially the planning direction and goals identified in the new Official Plan. Aerial photographs of the study area were examined and a driving and walking tour of the Study Area was conducted in April of 2016. During this walking tour, approximately 40 photographs were taken across the study area. A “community improvement lens” was applied to the area with observations and notes being made with respect to the key aspects of land use (including the mix of land uses), building conditions, vacant and underutilized lands and business activity. In particular, the potential for intensification and mixed use of vacant and underutilized properties was examined.

The information obtained from the review of relevant planning and policy documents and the Study Area tour was then used to identify the preliminary community improvement needs for the Study Area and the goals of the CIP. These community improvement needs and goals were presented at the first Workshop and the Economic Development and Planning Committee of Council Meeting. The community improvement needs and goals were then further refined based on stakeholder and public input as the preparation of this CIP took place.

### 5.3 Community Improvement Needs

The analysis identified several community improvement needs throughout the Study Area. The need for intensification and mixed use development was identified as being of paramount importance. This means encouraging higher density residential development via infill, redevelopment, conversion of space within existing mixed use buildings, and expansion of existing residential and mixed use buildings. It also means encouraging higher density mixed use development that will provide live-work and employment opportunities.



The analysis found that the Town has taken positive planning steps to designate intensification corridors and vacant and underutilized lands in and near those intensification corridors for higher density residential development and mixed use development in its new Official Plan. As this CIP is implemented, the Town is encouraged through future Official Plan reviews, secondary plans/reviews and other planning studies to continue to identify and designate lands in and near the intensification corridors and other appropriate locations that for higher density residential use and mixed use.



In addition to the primary community improvement need for more residential intensification and mixed use, the community improvement needs analysis also identified a number of needs in terms of the nature of the intensification and mixed use development that will take place in the Study Area, i.e., how this development will look and function. These community improvement needs include development that:

- Is compact, mixed use, pedestrian friendly, connected, and supports active transportation (walking and cycling);
- Has high quality building and site design and development;
- Promotes accessibility, energy conservation and waste reduction; and,
- Offers a range of housing types and opportunities, including affordable housing.



## **5.4 Community Improvement Goals**

In summary, the community improvement needs analysis identified the following goals for this CIP:

### **5.4.1 Primary Goal**

Encourage residential intensification in the form of higher density residential development via infill, redevelopment, conversion of space within existing mixed use buildings, and expansion of existing residential and mixed use buildings, and encourage mixed use development that provides live-work and employment opportunities.

### **5.4.2 Secondary Goals**

Encourage residential intensification and mixed use development that:

- Is compact, pedestrian friendly, connected, and supports active transportation (walking and cycling);
- Is of a high quality in terms of building and site design and promotes accessibility, energy conservation and waste reduction; and,
- Offers a range of housing types and opportunities, including affordable housing.

## 6.0 COMMUNITY IMPROVEMENT PROJECT AREA

In order to delineate a recommended Community Improvement Project Area for this CIP, the Study Area shown in Appendix A and properties adjacent to the Study Area were examined to determine current land uses, official plan designation, and zoning. This was augmented by the community improvement needs analysis that examined building conditions, vacant and underutilized properties, and the potential for intensification and mixed use.

The Study Area, which includes lands along the Intensification Corridor and lands designated medium and high density residential or mixed use, was found to accurately encompass those properties most in need of community improvement. These are the lands that have the highest need and potential for residential intensification and mixed use.

However, it was recognized that there may be some other properties in appropriate locations in the three urban communities of Beamsville, Vineland and Jordan or other urban communities in Lincoln that may be redesignated and/or rezoned in the future for medium or high density residential use or mixed use. This will help to further the Town's intensification and mixed use goals. Comments received from stakeholders, staff and Council indicate that rather than requiring an amendment to a map based Community Improvement Project Area, these lands should be automatically included within the Community Improvement Project Area when they are redesignated and/or rezoned in the future for medium or high density residential use or mixed use. Consequently, the recommended Community Improvement Project Area for this CIP is defined as:

- a) ***All lands within the Urban Area that front on an Intensification Corridor and are designated or zoned for one of the following uses: medium density residential, high density residential, or mixed use<sup>7</sup>;***
- b) ***All lands within the Urban Area that do not front on an Intensification Corridor that are designated or zoned for one of the following uses: medium density residential, high density residential, or mixed use, at the time of designation by by-law of the Community Improvement Project Area<sup>7</sup>; and,***
- c) ***All lands within the Urban Area that do not front on an Intensification Corridor that are designated or zoned by Council after the designation of the Community Improvement Project Area for one of the following uses: medium density residential, high density residential, or mixed use<sup>7</sup>.***

The Community Improvement Project Area is properly defined as noted above. **Appendix D** illustrates the geographic delineation of the Community Improvement Project Area based on the above-noted definition at the time of preparation of this CIP. Any expansion of the Community Improvement Project Area as per c) above will require a formal amendment to this Plan in accordance with Section 28 of the *Planning Act*.

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<sup>7</sup> "Mixed Use" Includes properties that are designated or zoned Commercial where mixed use is permitted.

## 7.0 INCENTIVE PROGRAMS

### 7.1 Approach

The financial incentive programs contained in this CIP are specifically designed to address the community improvement needs, and over time, help achieve the community improvement goals identified in Section 5.0. The community improvement needs and goals are in turn based on the results of the background policy and planning review, community improvement needs analysis and vital input from the public, stakeholders, Town and Regional staff and Council.

The incentive programs contained in the CIP can be activated by Council, one or more at a time, based on Council approval of the implementation of each program, subject to the availability of funding. This CIP is an enabling document, however, Council is under no obligation to activate and implement any of the incentive programs contained in this CIP. Once activated, the programs in this CIP can be used individually or together by an applicant. The Town may accept applications all year round for any of the incentive programs contained in this CIP, or the Town may periodically issue a Request for Applications (RFA) for any of the incentive programs contained in this CIP, e.g., once or twice per year, depending on budget considerations and program interest.

This CIP contains a Development Charge Reduction Grant Program and a Tax Increment Grant Program. In order to avoid any confusion or double dipping between the Development Charge Reduction Grant and Tax Increment Grant contained in this CIP and the Development Charge Reduction Grant and Tax Increment Grant available under the Vineland CIP or the Beamsville Commercial Core and Ontario Street Corridor CIP, for properties that are within the Project Area for this CIP and one of the other CIPs (Vineland or Beamsville), application can be made for only the Development Charge Reduction Grant Program and Tax Increment Grant Program in one CIP, i.e., applicants must choose which CIP they will use for the Development Charge Reduction Grant and Tax Increment Grant. For example, the Development Charge Grant from this CIP cannot be combined with the Tax Increment Grant from the Vineland or Beamsville CIP.

While properties that are within the Project Area for this CIP and one of the other CIPs (Vineland or Beamsville) must adhere to this requirement for the Development Charge Reduction Grant Program and Tax Increment Grant Program, these properties are eligible to make application for the remaining incentive programs available under the Vineland or Beamsville CIP, subject to meeting all other general and program specific requirements in this CIP and the Vineland or Beamsville CIP, whichever CIP is applicable.

General requirements that apply to all the programs contained in this CIP and program specific requirements have been included in this CIP to help ensure that the Town's intensification and mixed use goals for the Project Area will be achieved while protecting the financial interests of the Town of Lincoln. **Table 2** below summarizes basic program details for each of the incentive programs. The balance of this section provides the general program requirements, and basic details for each incentive program including the program purpose, description, and requirements.

Through its Smarter Niagara Incentive Programs, Niagara Region has established that it will contribute a matching proportionate share to tax increment grant programs offered by a local municipality through a local municipal CIP. Niagara Region offers its own Development Charge Reduction Program for Regional development charges.

The percentage of the Development Charge Grant and Tax Increment Grant specified in Table 2 and the number of years that the annual Tax Increment Grant will be paid after project completion specified in Table 2 are maximums that can be offered by the Town. When Town Council actually implements these programs after the CIP is adopted and approved, Council can set these maximums at or below the maximums specified in Table 2, depending on budget considerations at the time. It is recommended that the program duration for both of the incentive programs contained in this CIP be 10 years<sup>8</sup>.

**Table 2 Summary of Incentive Programs**

Project Performance	Program Description	
<b>If as-built project achieves:</b>	<b>Development Charge Grant equals</b>	<b>Tax Increment Grant equals</b>
Minimum intensification targets or mixed use targets <sup>9</sup>	<b>50%</b> of Town DC normally payable	Annual Grant = <b>80%</b> of municipal tax increment for <b>5 years</b> -- 100% if on a brownfield site
<b>If as-built project <u>also</u> achieves:</b>		
1) Requisite Number of Regional Smart Growth Design Criteria or any level of LEED certification	<b>+25%</b> of Town DC normally payable	Annual Grant = <b>80%</b> of municipal tax increment for <b>7 years</b> -- 100% if on a brownfield site
2) Minimum 20% of residential units are affordable <sup>10</sup>	<b>+25%</b> of Town DC normally payable	Annual Grant = <b>80%</b> of municipal tax increment for <b>8 years</b> -- 100% if on a brownfield site
3) 1) and 2) above	<b>+50%</b> of Town DC normally payable	Annual Grant = <b>80%</b> of municipal tax increment for <b>10 years</b> -- 100% if on a brownfield site

<sup>8</sup> Council may reduce or extend the program duration of any or all of the incentive programs beyond 10 years without amendment to this Plan.

<sup>9</sup> See **Appendix E** for minimum intensification and mixed use targets. Appendix E does not form part of the CIP, and therefore may be changed from time to time as required without amendment to this Plan.

<sup>10</sup> See **Appendix F** for the definition of “affordable”. Appendix F does not form part of the CIP, and therefore may be changed from time to time as required without amendment to this Plan.



## 7.2 General Program Requirements

All of the financial incentive programs contained in this CIP are subject to the following general requirements as well as the individual requirements specified under each program. The general and program specific requirements contained in this CIP are not necessarily exhaustive, and the Town reserves the right to include other requirements and conditions as deemed necessary on a property specific basis:

- a) Application for any of the incentive programs contained in this Plan can be made only for properties within the Community Improvement Project Area;
- b) Application for the incentive programs contained in this Plan can be made only for proposed development projects that meet the applicable minimum intensification and mixed use targets specified in Appendix E;
- c) An application for any financial incentive program contained in this CIP must be submitted to the Town prior to the commencement of any works to which the financial incentive program will apply and prior to application for building permit;
- d) The applicant must be the owner of the property;
- e) An application for any financial incentive program contained in this CIP must include plans, estimates, contracts, reports, rental rates, sale prices, and other details as required by the Town to satisfy the Town with respect to costs of the project and conformity of the project with the CIP;
- f) The Town may require that an applicant submit professional urban design studies and/or professional architectural/ design drawings that are in conformity with Design Guidelines put in place by the Town;
- g) Review and evaluation of an application and supporting materials against program eligibility requirements will be done by Town staff, who will then make a recommendation to Town Council or Council's designate. The application is subject to approval by Town Council or Council's designate;
- h) Each program in this CIP is considered active if Council has approved implementation of the program, and Council has approved a budget allocation for the program (as applicable);
- i) As a condition of application approval, the applicant may be required to enter into a grant agreement with the Town. This Agreement will specify the terms, duration and default provisions of the incentive to be provided. This Agreement is also subject to approval by Town Council or Council's designate;
- j) Where other sources of government and/or non-profit organization funding (Federal, Provincial, Municipal, CMHC, Federation of Canadian Municipalities, etc...) that can be applied against the eligible costs are anticipated or have been secured, these must be declared as part of the application. Accordingly, the grant may be reduced on a pro-rated basis;
- k) The Town reserves the right to audit the cost of any and all works that have been approved under any of the financial incentive programs, at the expense of the applicant;
- l) The Town is not responsible for any costs incurred by an applicant in relation to any of the programs, including without limitation, costs incurred in anticipation of a grant;



- m) If the applicant is in default of any of the general or program specific requirements, or any other requirements of the Town, the Town may delay, reduce or cancel the approved grant, and require repayment of the approved grant;
- n) The Town may discontinue any of the programs contained in this CIP at any time, but applicants with approved grants will still receive said grant, subject to meeting the general and program specific requirements;
- o) All proposed works approved under the financial incentive programs and associated improvements to buildings and/or land must conform to all Town guidelines, by-laws, policies, procedures, and standards;
- p) All works completed must comply with the description of the works as provided in the application form and contained in the program agreement, with any amendments as approved by the Town;
- q) Existing and proposed land uses must be in conformity with applicable Official Plan(s), Zoning By-law and other planning requirements and approvals at both the local and regional level;
- r) All improvements made to buildings and/or land shall be made pursuant to a Building Permit, and/or other required permits, and constructed in accordance with the Ontario Building Code and all applicable zoning requirements and planning approvals;
- s) When required by the Town, outstanding work orders, and/or orders or requests to comply, and/or other charges from the Town must be satisfactorily addressed prior to grant approval/payment;
- t) Property taxes must be in good standing at the time of program application and throughout the entire length of the grant commitment;
- u) Town staff, officials, and/or agents of the Town may inspect any property that is the subject of an application for any of the financial incentive programs offered by the Town;
- v) Eligible applicants can apply for one, more or all of the incentive programs contained in this CIP, but no two programs may be used to pay for the same eligible cost;
- w) Applicants approved for the programs contained in this CIP will be required to complete the eligible works within specified timeframes; and,
- x) The total of all grants, loans and tax assistance provided in respect of the particular property for which an applicant is making application under the programs contained in this CIP and any other applicable CIPs shall not exceed the eligible cost of the improvements to that particular property under all applicable CIPs.

## **7.3 Development Charge Reduction Grant Program**

### **7.3.1 Purpose**

The purpose of this program is to encourage intensification and mixed use in the Project Area by providing a financial incentive that reduces or completely removes the Town's development charge payable on such development projects. This incentive is also designed to encourage intensification and mixed use that is high quality in terms of building and site design; compact, pedestrian friendly, supports active transportation; promotes accessibility, energy conservation and waste reduction; and offers a range of housing types and opportunities, including affordable housing.

### **7.3.2 Description**

This program will complement and operate on a similar basis to the Regional Development Charge Exemption/Waiver Program in community improvement project areas. The reduction of local municipal development charges is not required by the Region as a condition of the Regional program, but it is encouraged by the Region. Combined with the Regional development charge reduction, a reduction of the Town's development charges will likely prove to be a significant upfront financial incentive to promote intensification and mixed use in the Project Area.

As shown in Table 2, the Town's Development Charge Reduction Grant Program will provide a grant equal to between 50% and 100% of the Town development charges normally payable for an as-built residential intensification or mixed use development/redevelopment project in the Project Area that meets minimum residential intensification/mixed use targets (see Appendix E for the minimum residential intensification and mixed use targets).

The grant will be paid only once:

- a) The eligible project is complete;
- b) Final building inspections have taken place;
- c) An occupancy permit has been issued (as applicable);
- d) All deficiencies have been addressed;
- e) All program and grant agreement requirements have been met to the Town's satisfaction; and,
- f) The as-built project performance of the eligible project has been determined by the Town.

### **7.3.3 Program Requirements**

Applicants are eligible to apply for funding under this program subject to meeting the general program requirements, the following program requirements, and subject to the availability of funding as approved by Council:

- a) The following types of projects are considered eligible for the program:

- i) All residential development on lands designated or zoned for High Density Residential or Medium Density Residential and all mixed use development on lands zoned for Mixed Use Development<sup>11</sup> that is not exempt from payment of development charges.
- b) The Town may require the applicant to submit a Business Plan, with said plan to the municipality's satisfaction;
- c) The Town may require the applicant to submit for approval impact studies such as traffic studies and studies of microclimatic conditions (sun, shadow, wind);

For projects on brownfield sites<sup>12</sup>, the following additional program requirements apply:

- d) The application must be accompanied by a Phase II ESA, Remedial Work Plan or Risk Assessment Plan prepared by a qualified person that contains:
  - i) an estimate of the cost of actions that will be required to reduce the concentration of contaminants on, in or under the property to permit a record of site condition (RSC) to be filed in the Environmental Site Registry under Section 168.4 of the Environmental Protection Act; and,
  - ii) a work plan and budget for said environmental remediation, and/or risk management actions;
- e) Upon completion of remediation/risk assessment, the owner shall file in the Environmental Site Registry an RSC for the property signed by a qualified person, and the owner shall submit to the Town proof that the RSC has been acknowledged by the Ministry of Environment (MOE).

## **7.4 Intensification and Mixed Use (Tax Increment) Grant Program**

### **7.4.1 Purpose**

The purpose of this program is to encourage intensification and mixed use in the Project Area by providing a financial incentive that reduces the property tax increase that can result from these types of development projects. This incentive is also designed to encourage intensification and mixed use that is high quality in terms of building and site design; compact, pedestrian friendly, supports active transportation; promotes accessibility, energy conservation and waste reduction; and offers a range of housing types and opportunities, including affordable housing.

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<sup>11</sup> Includes properties that are designated or zoned Commercial where mixed use is permitted.

<sup>12</sup> Brownfield sites are sites where a Phase II Environmental Site Assessment (ESA) has been conducted, and that as of the date the Phase II ESA was completed, did not meet the required standards under subparagraph 4i of Section 168.4(1) of the *Environmental Protection Act* to permit a Record of Site Condition (RSC) for the proposed use to be filed in the Environmental Site Registry.

### 7.4.2 Description

As shown in Table 2, the Intensification and Mixed Use (Tax Increment) Grant Program will provide a tax increment based grant equal to 80% of the municipal (Town and Region) property tax increase for up to 10 years following completion of an as-built residential intensification or mixed use development/redevelopment project in the Project Area that meets minimum residential intensification/mixed use targets (see Appendix E for the minimum residential intensification and mixed use targets). The eligible project must create an increase in assessment, and therefore an increase in property taxes.

For projects as defined above on brownfield sites, where a Phase II Environmental Site Assessment (ESA) has been conducted, and that as of the date the Phase II ESA was completed, did not meet the required standards under subparagraph 4i of Section 168.4(1) of the *Environmental Protection Act* to permit a Record of Site Condition (RSC) for the proposed use to be filed in the Environmental Site Registry, the program will provide a tax increment based grant equivalent to 100% of the municipal (Town and Region) property tax increase for up to 10 years following completion of the project.

The grant will be paid annually once:

- a) The eligible project is complete;
- b) Final building inspections have taken place;
- c) An occupancy permit has been issued (as applicable);
- d) All deficiencies have been addressed;
- e) All program and grant agreement requirements have been met to the Town's satisfaction;
- f) The property has been reassessed by the Municipal Property Assessment Corporation (MPAC);
- g) The new property taxes have been paid in full for the year; and,
- h) The as-built project performance of the eligible project has been determined by the Town.

Pre-project Municipal taxes will be determined before commencement of the project at the time the application is approved. For purposes of the grant calculation, the increase in municipal taxes will be calculated as the difference between pre-project municipal taxes and post-project municipal taxes that are levied as a result of re-valuation of the property by the MPAC following project completion. Grant payments will cease when the total grant along with all other grants, tax assistance and loans provided equals the cost of rehabilitating the lands and buildings, or after 10 years, whichever comes first.

### 7.4.3 Program Requirements

Applicants are eligible to apply for funding under this program, subject to meeting the general program requirements and the following program requirements:

- a) The following types of projects are considered eligible for this program:

- i) All residential development on lands designated or zoned for High Density Residential or Medium Density Residential and all mixed use development on lands zoned for Mixed Use Development<sup>13</sup> where the development/redevelopment project results in an increase in the assessed value and taxes on the property<sup>14</sup>;
- b) The Town may require the applicant to submit a Business Plan, with said plan to the municipality's satisfaction;
- c) The Town may require the applicant to submit for approval impact studies such as traffic studies and studies of microclimatic conditions (sun, shadow, wind);
- d) If during the grant period, a building receiving a Tax Increment Grant is demolished, all grant payments shall cease and the Town reserves the right to require repayment of the grant payments;
- e) If during the grant period, a building/property designated under the Ontario Heritage Act receiving a Tax Increment Grant is demolished or any of the heritage features are altered in any way that would compromise the reasons for designation, all grant payments shall cease and the Town reserves the right to require repayment of the grant payments.

For projects on brownfield sites<sup>15</sup>, the following additional program requirements apply:

- f) The application must be accompanied by a Phase II ESA, Remedial Work Plan or Risk Assessment Plan prepared by a qualified person that contains:
  - i) an estimate of the cost of actions that will be required to reduce the concentration of contaminants on, in or under the property to permit a record of site condition (RSC) to be filed in the Environmental Site Registry under Section 168.4 of the Environmental Protection Act; and,
  - ii) a work plan and budget for said environmental remediation, and/or risk management actions;
- g) The owner shall file in the Environmental Site Registry a Record of Site Condition (RSC) for the property signed by a qualified person, and the owner shall submit to the Town proof that the RSC has been acknowledged by the Ministry of Environment (MOE).

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<sup>13</sup> Includes properties that are designated or zoned Commercial where mixed use is permitted.

<sup>14</sup> This program does not apply to any residential construction project that creates less than two net residential units.

<sup>15</sup> Brownfield sites are sites where a Phase II Environmental Site Assessment (ESA) has been conducted, and that as of the date the Phase II ESA was completed, did not meet the required standards under subparagraph 4i of Section 168.4(1) of the *Environmental Protection Act* to permit a Record of Site Condition (RSC) for the proposed use to be filed in the Environmental Site Registry.

## 8.0 MONITORING PROGRAM

### 8.1 Purpose

The Monitoring Program set out in this section has several purposes. It is designed to monitor:

- a) Funds dispersed through the CIP incentive programs so as to determine which programs are being most utilized, and use this information to adjust the programs, as required;
- b) Feedback from applicants to the incentive programs so that adjustments can be made to the incentive programs, as required; and,
- c) The economic impact associated with projects taking advantage of the CIP incentive programs.

This CIP is not intended to be a static planning document. It is intended to be a proactive plan for economic and community renewal and revitalization in the Project Area. Therefore, information obtained through the Monitoring Program should be used by the Town to periodically adjust the incentive programs to make them even more relevant and user friendly. Information collected through the Monitoring Program should be utilized to provide regular reports to Council on the amount of private sector investment being leveraged by the municipal incentive programs and the economic benefits associated with these private sector projects.

### 8.2 Description

Monitoring of the uptake and performance of the incentive programs should be done on a regular basis and these monitoring results reported to Council annually. As well, feedback from users of the incentive programs should be considered and utilized to adjust the incentive programs in order to improve their effectiveness and ensure that the incentive programs are effective for a range of project types and sizes in the community improvement project area.

**Table 3** presents a list of the variables that should be monitored on an individual project and aggregate basis for the incentive programs contained in this CIP. In addition to these quantitative economic measures, the Town should also attempt to monitor the qualitative results of the CIP in terms of its social and community benefits both within and outside the Intensification Corridors. Regular qualitative observations should be conducted by Town staff of the individual and cumulative impact of residential intensification and mixed use projects in the Project Area. This could include comments received by staff from business owners, property owners and residents. These qualitative measures should be regularly monitored and reported to Council along with the quantitative measures specified in Table 3.

**Table 3: Monitoring Variables**

Program	Monitoring Variable
1. <b>Development Charge Reduction Grant</b>	<ul style="list-style-type: none"> <li>• Number of applications by type (conversion, intensification, infill)</li> <li>• \$ amount of development charge reduced by project;</li> <li>• \$ amount of grants awarded by type (LEED or Smart Growth)</li> <li>• Total \$ value of construction;</li> <li>• Number of residential units by type and square footage of residential space converted, rehabilitated or constructed;</li> <li>• Square footage of commercial and institutional space rehabilitated or constructed;</li> <li>• Number of new businesses successfully occupying space (1 year post completion);</li> <li>• Jobs created/maintained;</li> <li>• Increase in assessed value of participating property;</li> <li>• Increase in municipal (Town and Region) and education property taxes of participating property;</li> <li>• Number and \$ amount of program defaults.</li> </ul>
2. <b>Intensification and Mixed Use (Tax Increment) Grant</b>	<ul style="list-style-type: none"> <li>• Number of applications by type (conversion, intensification, infill)</li> <li>• \$ amount of grant;</li> <li>• Total \$ value of construction;</li> <li>• Number of residential units by type and square footage of residential space converted, rehabilitated or constructed;</li> <li>• Square footage of commercial and institutional space rehabilitated or constructed;</li> <li>• Number of new businesses successfully occupying space (1 year post completion);</li> <li>• Jobs created/maintained;</li> <li>• Increase in assessed value of participating property;</li> <li>• Increase in municipal (Town and Region) and education property taxes of participating property;</li> <li>• Number and \$ amount of program defaults.</li> </ul>

### 8.3 Program Adjustments

The individual incentive programs contained in this CIP can be activated, deactivated or discontinued by Council without amendment to this Plan. Increases in funding provided by the financial incentives contained in this CIP via increase in the Development Charge Grant percentage and/or Tax Increment Grant percentage and/or increase in the number of years the Tax Increment Grant would be paid out, the addition of any new incentive programs to this CIP, expansion of the uses included in the Community Improvement Project Area, or expansion of the Community Improvement Project Area, will require a formal amendment to this Plan in accordance with Section 28 of the *Planning Act*. The Town may periodically review and adjust the terms and requirements of any of the programs contained in this Plan, without amendment to the Plan. Such minor changes or discontinuation of programs will be provided to the Minister of Municipal Affairs and Housing for information purposes only.

## **9.0 MARKETING STRATEGY**

### **9.1 Key Objective and Messages**

It is important to the successful implementation of this CIP that the Town's incentive programs and the leadership role being taken by the Town on the incentive programs and any the public realm improvement actions in the Project Area be effectively communicated to property owners, business owners, developers, potential end users, and residents within the Project Area, within the rest of the Town, within the Region of Niagara, and beyond. The purpose of this Marketing Strategy is to proactively and regularly educate, advertise and market the Town's incentive programs and planned public realm improvements being taken by the Town to actively support residential intensification and mixed use within the Community Improvement Project Area.

It is recommended that the Town budget for and implement a Marketing Strategy that:

- a) provides direction on how to obtain information on available incentive programs, including program guides and application forms, as well as assistance and advice from Town staff on making application for the incentive programs;
- b) informs property and business owners and developers with regard to actions planned by the Town and Region to improve conditions within the Project Area; and,
- c) publicizes recent intensification and mixed use project success stories within the Project Area.

### **9.2 Reaching the Target Audience**

The long-term success of the CIP will depend on investment from both within (existing property and business owners) and outside the Project Area. Therefore, it is important to market to both these target audiences. Therefore, it will be very important for the Town to regularly reach out to these groups using the marketing tools and inform them about available incentive programs, and any planned public realm improvements and intensification and mixed use projects.

The Marketing Strategy should be targeted to:

- a) Existing property owners and business owners both within and outside the Project Area;
- b) Developers active in Lincoln, Niagara and outside Niagara;
- c) Support professionals, including real estate professionals, lending institutions such as banks and trust companies, planning consultants, architects, and others; and,
- d) Residents within and outside the Project Area, as well as the general public.

### **9.3 Marketing Tools**

The marketing of the CIP incentive programs should be a comprehensive multi-media campaign containing information, education and advertising components. The following key tools are recommended to implement the Marketing Strategy:

- a) A Publication, e.g., a newsletter, containing a description of the financial incentive programs available from the Town, including general program requirements and how to apply, highlights of



- planned public realm improvements and profiles of residential intensification and mixed use projects that take advantage of the CIP incentive programs;
- b) Profiling of the incentive programs and intensification and mixed use success stories in planning and economic development publications, newsletters and other publications published by the Town and the Region;
  - c) Stories in local media (newspaper, radio, web) on the CIP, public realm improvements and revitalization success stories in the Project Area;
  - d) Addition to the Town's web page via addition of direct (one-click) access to information on the available incentive programs and the aforementioned newsletter;
  - e) Periodic presentations to the target audience on the CIP, available incentives programs, Town activities/ public realm improvements, and intensification and mixed use project success stories in the Project Area;
  - f) Media Releases and profiles of successful projects and initiatives should be sent to local and outside media; and,
  - g) Requiring recipients of CIP grants and loans to post a sign (supplied by the Town) that indicates that the project is taking advantage of the Town's CIP incentive programs.

## 10.0 IMPLEMENTATION PLAN

### 10.1 Basis

Sections 28(3), 28(6) and 28(7) of the *Planning Act* identify that once a Community Improvement Project Area has been designated and a CIP is approved, a municipality may undertake a number of different actions, including:

- a) Acquire, hold, clear, grade or otherwise prepare land for community improvement;
- b) Construct, repair, rehabilitate or improve buildings on land acquired or held by it in conformity with the community improvement plan;
- c) Sell, lease, or otherwise dispose of any land and buildings acquired or held by it in conformity with the community improvement plan; and,
- d) Making grants or loans to registered owners, assessed owners and tenants of lands and buildings within the community improvement project area.

Once this CIP is adopted and approved, the Town of Lincoln may engage in any of these activities and use its powers under the *Municipal Act, 2001* to implement this CIP.

### 10.2 Purpose

The purpose of the Implementation Plan is to identify the key actions required to implement the incentive programs contained in this CIP. The Implementation Plan in **Table 4** below specifies the key implementation actions, stakeholders, priority and timing of the recommended incentive programs and supporting actions, including administration, marketing and monitoring of the incentive programs.

### 10.3 Priorities

The priorities assigned to the recommendations reflect the guiding principle that those recommendations that will have the most significant positive impact should be highest priority. The priority and timing framework in Table 4 is intended only as a general guide, and may be adjusted over time depending on budget considerations and other factors impacting the Project Area.

**Table 4: Implementation Plan**

Action	Stakeholder Involvement	Priority	Timing		
			Short Term (0-2 years)	Medium Term (2-5 years)	Long Term (5+ years)
1. Implement Development Charge Reduction Grant Program	➤ Town ➤ Property owners/developers	Very High			
2. Implement Tax Increment Grant Program	➤ Town ➤ Region ➤ Property owners/developers	High			
3. Prepare Program Guides, Application Forms and other Incentive Program Implementation Materials	➤ Town	Very High			
4. Implement Monitoring Program	➤ Town ➤ Property owners/developers	High			
5. Implement Marketing Strategy	➤ Town ➤ Region ➤ Property owners/developers	Medium			

## 11.0 CONCLUSION

This CIP is based on direction in the Town's Official Plan and other key planning and policy documents to promote residential intensification and mixed use in and around the Town's Intensification Corridors. This includes apartments and other forms of higher density housing as well as commercial/residential mixed-use to promote additional employment uses in the Town. Furthermore, this CIP seeks to promote intensification and mixed use that is high quality in terms of building and site design; compact, pedestrian friendly, supports active transportation; promotes accessibility, energy conservation and waste reduction; and offers a range of housing types and opportunities, including affordable housing. The achievement of these goals will help the Town become more vibrant and prosperous and help to ensure the sustainability of the Town's urban areas.

The recommended incentive programs contained in this CIP have been developed specifically to address the key community improvement needs in the Project Area. The preparation of this CIP has benefitted from a program of key stakeholder and community consultation. This included input provided by property and business owners, developers, residents and the public through two workshop sessions, as well as input provided by Town Council and Town and Regional staff.

The adoption and approval of this CIP will provide the legislative basis and comprehensive policy framework for the programs needed to achieve the Town's residential intensification, mixed use, and other goals for the Project Area. Successful implementation of this CIP will require a commitment by Council to implement, administer, market and monitor the incentive programs.

Experience in other municipalities has shown that early and effective implementation of the Marketing Strategy will help to make developers, property and business owners aware of the available incentive program opportunities. This will result in a more successful CIP. Ongoing monitoring of the performance of the incentive programs and adjustment of the programs as required will also help to ensure the effectiveness of this CIP.

The investment made by the Town in this CIP will be augmented and supported by the Region's Smarter Niagara Incentive Programs which are designed to support local community improvement plan initiatives. In summary, more residential intensification and mixed use development in the Project Area will help the Town achieve its planning and economic development goals for the urban communities in the Project Area. This will benefit not only property owners, businesses and residents in the Project Area, but also residents, business and property owners in Lincoln and the wider regional community as a whole.

# APPENDIX A

## Study Area

# BEAMSVILLE



Metric Scale:  
N.T.S.



SUBJECT LANDS DESIGNATED OR ZONED  
FOR HIGH DENSITY OR MEDIUM DENSITY



SUBJECT LANDS  
DESIGNATED MIXED USE



INTENSIFICATION CORRIDOR



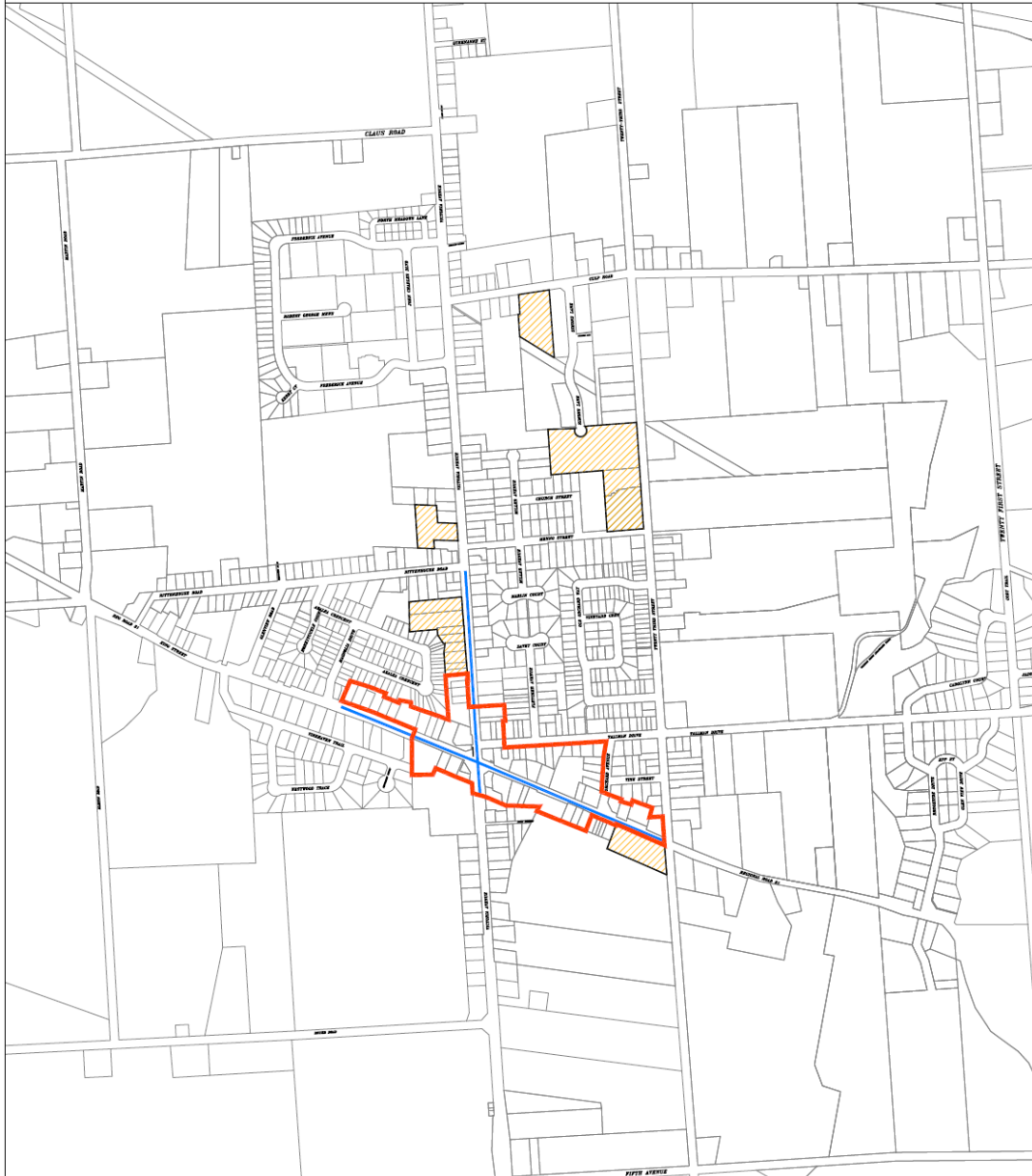
CIP AREA

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# VINELAND



Metric Scale:  
N.T.S.



SUBJECT LANDS DESIGNATED OR ZONED  
FOR HIGH DENSITY OR MEDIUM DENSITY



INTENSIFICATION CORRIDOR



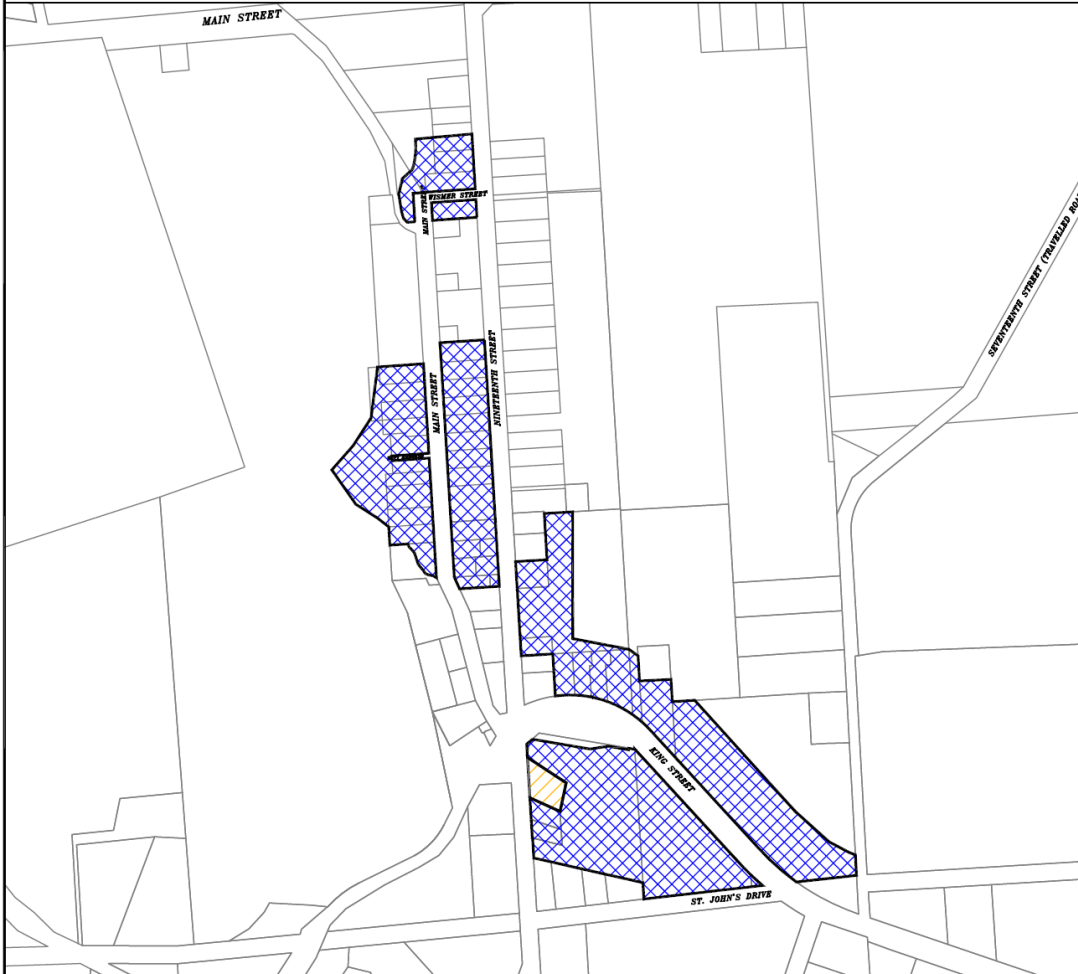
CIP AREA

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# JORDAN



Metric Scale:  
N.T.S.



SUBJECT LANDS DESIGNATED OR ZONED  
FOR HIGH DENSITY OR MEDIUM DENSITY



SUBJECT LANDS  
DESIGNATED MIXED USE

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## **APPENDIX B**

### **SMARTER NIAGARA INCENTIVE PROGRAMS**

## **Reduction of Regional Development Charges**

In designated community improvement project areas that are included in Regional Development Charges By-law No. 62-2012, as amended from time to time, the Region offers a reduction of 50% of the Regional development charge for new residential, commercial or institutional development or conversion of existing buildings to those uses. An additional 50% Development Charge reduction is available to developments that include Smart Growth Design Criteria into the proposed development. If the project is on a brownfield site in a central urban area, the Region provides an automatic 75% Development Charge Reduction with an additional 25% Development Charge reduction available to developments that include Smart Growth Design Criteria into the proposed development.

## **Property Rehabilitation and Redevelopment Tax Increment Funding Program**

The purpose of this grant is to stimulate building and property rehabilitation or redevelopment. This includes downtown sites and brownfield sites. The Region will match the percentage of the tax increment generated by a rehabilitation or redevelopment project that is paid by the municipality in the form of a grant to the applicant. If the project is on a brownfield site, affordable housing or conforms to the Region's Smart Growth Design Criteria, the Region will provide a minimum 75% tax increment grant. Because the Regional tax share is larger than the local municipal tax share, this means that the Region will contribute more to the tax increment based grant than the local municipality.

## **Building and Facade Improvement Grant/Loan Program**

The purpose of this program is to promote the structural improvement of buildings and/or the improvement of building facades. The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant/loan from the Region of \$10,000 for front façade improvement and/or building improvement, and a matching grant/loan from the Region of \$10,000 for side and/or rear façade improvement. All façade improvements eligible for this program must conform to the Region's Model Urban Design Guidelines or local municipal design guidelines.

## **Residential Grant/Loan Program**

The purpose of this program is to promote residential conversion, infill and intensification. The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant from the Region of \$7,500 per unit or a matching loan from the Region of \$10,000 per unit, with a maximum of 20 units per property.

## **Heritage Restoration and Improvement Grant/Loan Program**

The purpose of this program is to promote the restoration and improvement of buildings designated under the Ontario Heritage Act. The Region will provide a matching grant or loan on a cost shared basis with the local municipality to a maximum grant or loan from the Region of \$5,000 per residential property and \$15,000 per commercial or industrial property.

## **Environmental Assessment Study Grant Program**

The purpose of this program is to promote the undertaking of environmental site assessments so that better information is available with respect to the type of contamination and potential remediation costs on brownfield properties. The Region will provide a matching grant on a cost shared basis with the local municipality to a maximum grant from the Region of \$5,000 per property to promote the completion of Phase II Environmental Site Assessments, Remedial Action Plans and Risk Assessments.

## **Public Domain Incentives Program**

This program was introduced in 2007. The Region will provide a matching grant on a cost shared basis with the local municipality to a maximum grant from the Region of \$100,000 per project (subject to availability of funding from the Region) to support public realm improvements already identified in, or in compliance with, municipal planning documents including CIPs, Secondary Plans or Official Plans. This program is based on a competitive evaluation process whereby the project must meet the Region's eligibility criteria and applications are evaluated using the Region's Smart Growth Design Criteria. These criteria include a "green component" constituting a minimum of 6% of overall project cost and compliance with local or Regional Urban Design Guidelines. Preference will be given to projects that include heritage and/or public art components.

## **APPENDIX C**

### **TOWN OF LINCOLN OFFICIAL PLAN SECTION 8.4 COMMUNITY IMPROVEMENT PLANS**

## **8.4 COMMUNITY IMPROVEMENT PLANS**

### **8.4.1 Introduction**

The Town may designate areas as community improvement project areas and may prepare and adopt community improvement plans for the project areas.

### **8.4.2 Objectives**

#### *Settlement Areas*

Community improvement plans may be prepared and adopted by the Town to achieve one or more of the following objectives:

- (a) To support public as well as private sector improvement efforts;
- (b) To foster the revitalization and *redevelopment* of downtowns;
- (c) To support the implementation of the Town's growth management policies as set out in this Plan;
- (d) To encourage private sector investment in order to preserve and enhance the viability of existing commercial areas;
- (e) To maximize the use of existing public *infrastructure* by encouraging infilling, *intensification* and *redevelopment* of lands and buildings;
- (f) To encourage, support and coordinate private and public sector renovation, repair, rehabilitation, *redevelopment* or other improvement of lands and/or buildings;
- (g) Maintain and improve municipal services including sanitary sewers, water, stormwater management, roads, sidewalks and streetlighting;
- (h) Encourage the conservation, restoration, adaptive re-use, maintenance, improvement and protection of cultural heritage resources;
- (i) Maintain and improve the transportation network to ensure adequate traffic flow, and parking facilities;

- (j) Support active transportation through urban design and the provision of improved facilities for cycling and pedestrians;
- (k) Improve and maintain the physical and aesthetic qualities and amenities of the streetscape;
- (l) Encourage the eventual elimination and/or relocation of incompatible land uses and where this is not feasible, to encourage physical improvements to minimize the incompatibility;
- (m) Improve environmental conditions;
- (n) Improve social conditions;
- (o) Promote cultural development and encourage the development of cultural facilities;
- (p) Facilitate and promote community economic development including development as a **Centre of Excellence for Agriculture**;
- (q) Improve community quality, safety and stability;
- (r) Improve the supply of *affordable* housing and the range of housing opportunities, particularly in downtowns;
- (s) Encourage the restoration, maintenance, improvement and protection of natural habitat, parks, open space, recreational and heritage facilities and amenities, and to establish new facilities where deficiencies exist to meet the needs of the citizens of the community;
- (t) Support the development of tourism in the Town;
- (u) Encourage and support environmentally sustainable *development*; and,
- (v) To encourage the *adaptive re-use* of cultural heritage resources.

### *Agricultural Areas*

Community improvement plans may be prepared and adopted by the Town to achieve one or more of the following objectives:

- (a) Foster the long term economic viability of agriculture by supporting the rehabilitation, adaptation and conversion of agricultural buildings and facilities for agricultural and agricultural *value added uses*;
- (b) Facilitate and promote agricultural services;
- (c) Maintain and enhance the scenic quality of the agricultural landscape; and,
- (d) To encourage the *adaptive re-use* of cultural heritage resources.

### **8.4.3 Policies**

#### **(a) Community Improvement Project Areas**

The Town may designate by by-law one or more community improvement project areas, the boundary of which may include all or part of lands within the Town's *Urban Area Boundaries* or all of part of lands within the agricultural designations.

#### **(b) Criteria for the Selection of Community Improvement Project Areas**

##### *Settlement Areas*

For an area within the *Settlement areas* to be designated as a community improvement project area, it must satisfy one or more of the following criteria:

- (i) Older stable or declining residential and commercial uses that are in need of rehabilitation, maintenance or *redevelopment*;
- (ii) Contains areas identified for *redevelopment and/or intensification* in the this Plan;

- (iii) Commercial and residential areas with poor physical condition or poor visual quality of the built environment, including but not limited to building facades, streetscapes, public amenity areas and urban design;
- (iv) Vacant lots and/or underutilized properties and buildings which have potential for infill, *redevelopment* or expansion to better utilize the land base;
- (v) Lack of or deficient water systems, sanitary sewer systems and/or stormwater management systems, roads, sidewalks and street lighting;
- (vi) Lack of or deficient sidewalks, curbs and/or roads;
- (vii) Lack of or deficient street lighting, streetscaping and street furniture and other related facilities;
- (viii) Lack of or deficient parks, open space and/or recreation and community facilities;
- (ix) Lack of or deficient bicycling, transit, and off-street parking facilities;
- (x) Lack of or deficient *affordable* housing or mix of housing opportunities;
- (xi) Buildings in need of physical improvements and/or repairs, including facade treatment and signage improvement in commercial areas;
- (xii) In commercial areas, the existence of a Business Improvement Area (BIA), or the potential for the establishment of a BIA;
- (xiii) Conflicts between existing *development* and adjacent transportation facilities;
- (xiv) Conflicts between bicycling and pedestrian circulation and adjacent transportation facilities;
- (xv) Minor incompatibilities between *development* where improvements to site design could resolve existing problems;



- (xvi) Improvement to energy efficiency and/or renewable energy efficiency;
- (xvii) Areas of known or suspected environmental contamination; and/or,
- (xviii) Other *significant* environmental, social or community economic development reasons for community improvement.

#### *Agricultural Areas*

For an area within the agricultural area to be designated as a community improvement project area, it must be designated *Specialty Agricultural* and/or *Prime Agricultural* in this Plan.

### **(c) Phasing**

The phasing of community improvements shall be prioritized according to:

- (i) The growth management policies and priorities as set out in the Regional Policy Plan and this Plan;
- (ii) The financial capability of the Town and Region to fund community improvement projects;
- (iii) Availability and timing of senior government programs that offer financial assistance for community improvement efforts;
- (iv) The timing of related capital expenditures to ensure that community improvements are coordinated; and,
- (v) Commitments by private property owners to upgrade their properties, and other circumstances which may affect the priority given to a community improvement area.

**(d) Implementation**

The Town may undertake the full range of actions permitted under Section 28 of the Planning Act to implement the objectives for Community Improvement contained in this Plan. As well the Town may:

- (i) Apply for financial assistance from and participate in senior level government programs that provide assistance to municipalities and/or private landowners for the purposes of community improvement;
- (ii) Support heritage conservation and improvement through means available under the *Ontario Heritage Act*;
- (iii) Provide information on municipal financial assistance programs, public realm improvements and other government assistance programs;
- (iv) Prepare design plans for commercial core areas that may include streetscape improvements, parkettes, public parking areas, lookouts and trail development; and,
- (v) Coordinate streetscaping improvements with the installation/upgrading of municipal services, e.g., sewer installation, road and sidewalk reconstruction.

Council shall be satisfied that its participation in community improvement activities will be within the financial capabilities of the Town.

**8.4.4 Contents of a Community Improvement Plan**

Community Improvement Plans shall contain the purpose of the plan, objectives, a description of the community improvement project area, a description of all programs and/or projects and an implementation plan. The preparation of a community improvement plan shall meet the minimum requirements of the Planning Act for public consultation.

## **APPENDIX D**

### **COMMUNITY IMPROVEMENT PROJECT AREA**

# BEAMSVILLE



Metric Scale:  
N.T.S.



SUBJECT LANDS DESIGNATED OR ZONED  
FOR HIGH DENSITY OR MEDIUM DENSITY  
RESIDENTIAL



SUBJECT LANDS  
DESIGNATED MIXED USE



INTENSIFICATION CORRIDOR



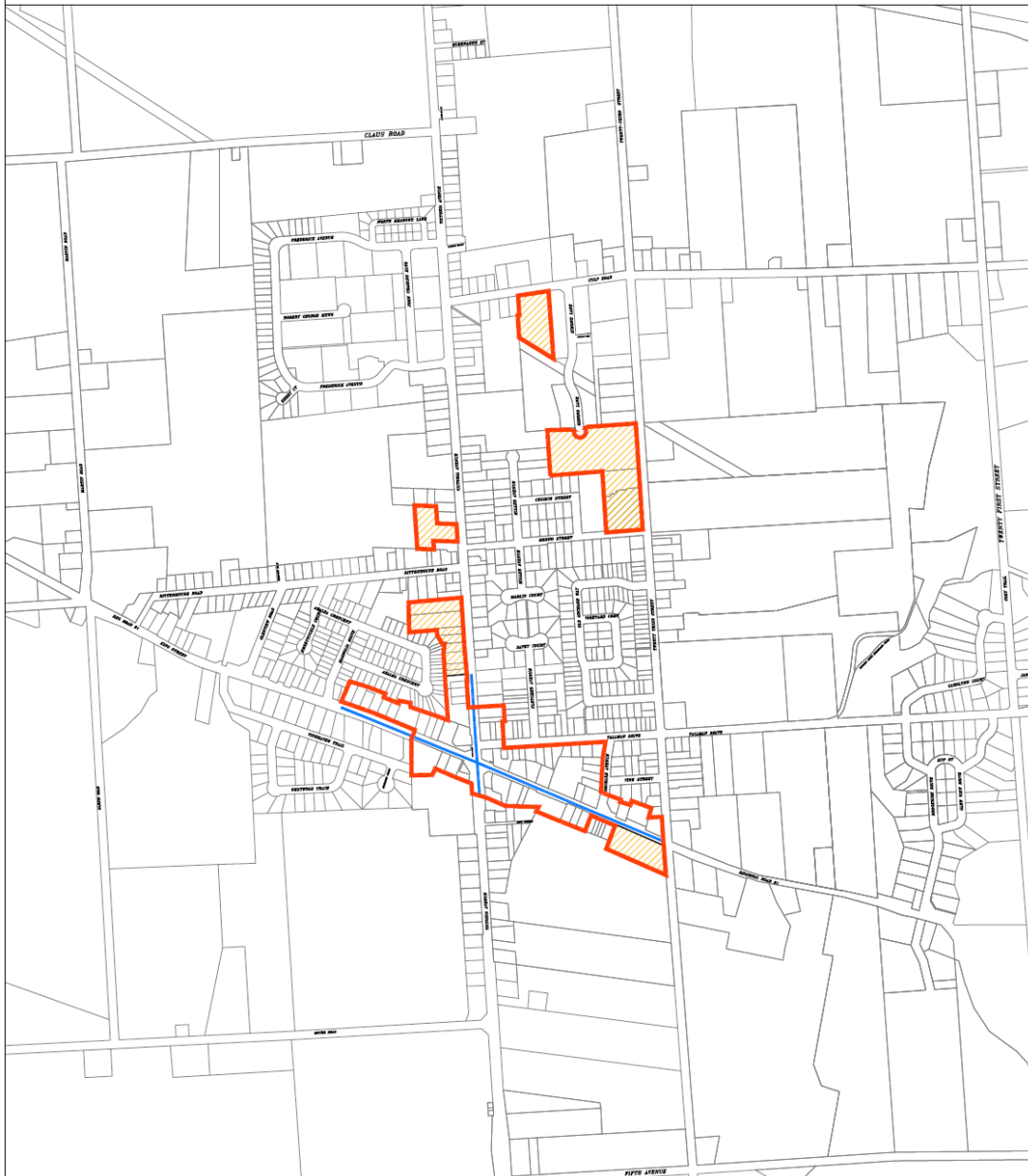
COMMUNITY IMPROVEMENT  
PROJECT AREA

\\Planning\Jonas\VarRad\Mappping\Location Maps\2016\Medium and High Density Areas

# VINELAND



Metric Scale:  
N.T.S.



SUBJECT LANDS DESIGNATED OR ZONED  
FOR HIGH DENSITY OR MEDIUM DENSITY  
RESIDENTIAL



INTENSIFICATION CORRIDOR



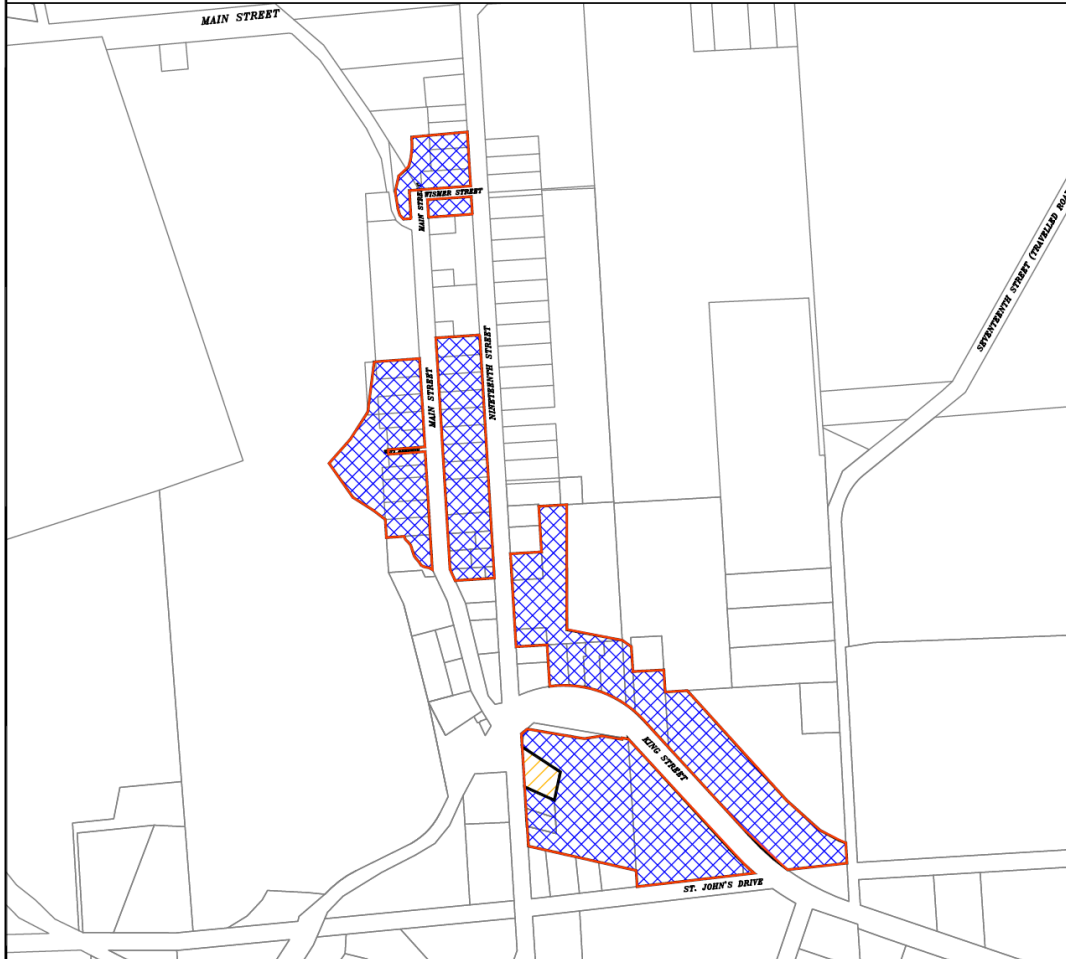
COMMUNITY IMPROVEMENT  
PROJECT AREA

G:\Planning\JamesVanRooi\Mapping\Location Maps\2016\Medium and High Density Areas

# JORDAN



Metric Scale:  
N.T.S.



SUBJECT LANDS DESIGNATED OR ZONED  
FOR HIGH DENSITY OR MEDIUM DENSITY  
RESIDENTIAL



SUBJECT LANDS  
DESIGNATED MIXED USE



COMMUNITY IMPROVEMENT  
PROJECT AREA

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## **APPENDIX E**

### **MINIMUM RESIDENTIAL INTENSIFICATION AND MIXED USE TARGETS**

If Project on Lands:	As-built Project must achieve the following minimum targets:
Designated High Density Residential in the Official Plan; or, Zoned Residential Multiple 3 Zone (RM3) in the Zoning By-law	<ul style="list-style-type: none"> <li>• 90 units per net ha.; <u>and</u></li> <li>• Four (4) storeys in height</li> </ul>
Designated Medium Density Residential in the Official Plan; or, Zoned Residential Multiple 1 Zone (RM1) or Residential Multiple 2 Zone (RM2) in the Zoning By-law	<ul style="list-style-type: none"> <li>• 50 units per net ha.; <u>and</u></li> <li>• Three (3) storeys in height</li> </ul>
Designated Mixed Use	<ul style="list-style-type: none"> <li>• 20% of residential units are live-work units; <u>and</u></li> <li>• Floor Area Ratio (FAR) of 0.75; <u>and</u></li> <li>• Three (3) storeys in height if on an Intensification Corridor and two (2) storeys in height elsewhere; <u>and</u></li> <li>• Applicable minimum High Density Residential or Medium Density Residential units per net ha. target adjusted downward based on the ratio of non-residential floor space to total floor space</li> </ul>

For the Development Charge Reduction Grant Program:

- a) Town development charges normally payable must be paid in full by an applicant at the time development charges are normally paid, e.g., building permit issuance; and,
- b) The Town may elect to establish a maximum total grant that can be paid under this program per property/project.



## **APPENDIX F**

### **DEFINITION OF AFFORDABLE HOUSING**

**Affordable Housing** means:

- a) in the case of ownership housing, the least expensive of:
  - i. housing for which the purchase price results in annual accommodation costs which do not exceed 30 per cent of gross annual household income for low and moderate income households; or
  - ii. housing for which the purchase price is at least 10 per cent below the average purchase price of a resale unit in the regional market area;
- b) in the case of rental housing, the least expensive of:
  - i. a unit for which the rent does not exceed 30 per cent of gross annual household income for low and moderate income households; or
  - ii. a unit for which the rent is at or below the average market rent of a unit in the regional market area.

For the purposes of this definition: Low and moderate income households means, in the case of ownership housing, households with incomes in the lowest 60 per cent of the income distribution for the regional market area; or in the case of rental housing, households with incomes in the lowest 60 per cent of the income distribution for renter households for the regional market area.