Committee of the Whole

Agenda

Date: July 7, 2025
Time: 9:30 am
Location: Council Chambers, City Hall, second floor

Pages

1. Call to Order

2. Land Acknowledgement

   Burlington as we know it today is rich in history and modern traditions of many First Nations and the Métis. From the Anishinaabeg to the Haudenosaunee, and the Métis – our lands spanning from Lake Ontario to the Niagara Escarpment are steeped in Indigenous history.

   The territory is mutually covered by the Dish with One Spoon Wampum Belt Covenant, an agreement between the Iroquois Confederacy, the Ojibway and other allied Nations to peaceably share and care for the resources around the Great Lakes.

   We acknowledge that the land on which we gather is part of the Treaty Lands and Territory of the Mississaugas of the Credit.

3. Approval of the Agenda

4. Declarations of Interest

5. Presentations

6. Delegations

To speak at a Committee meeting regarding an item on the agenda, individuals must register as a delegation no later than noon the Friday before the meeting. To register, complete the online application at www.burlington.ca/delegation or submit a written request by email to Legislative Services at clerks@burlington.ca

Individuals who have feedback to share but do not wish to speak at the committee meeting, can submit written comments by email to clerks@burlington.ca by noon the business day before the meeting. Comments received will be circulated to committee members in advance of the meeting.

7. Consent Items

Reports of a routine nature, which are not expected to require discussion and/or debate. Staff may not be in attendance to respond to questions on items contained in the Consent Agenda.

7.1 2025 capital variance and project closure (FIN-19-25) (CCS) 1 - 4

Receive for information finance department report FIN-19-25 regarding the 2025 capital variance and project closure.

7.2 Appointment to Downtown BIA Board of Directors (LLS-38-25) (CCS) 5 - 8

Appoint the following member to the Burlington Downtown Business Association (BDBA) Board of Directors for a term to expire July 2033 or upon appointment of their successor:

- Kimberley Nadherny

7.3 Appointments to the Burlington School Traffic Safety and Mobility Advisory Committee (LLS-39-25) (CCS) 9 - 12

Approve the appointments to the Burlington School Traffic Safety and Mobility Advisory Committee, as contained in confidential Appendix A to legislative services report LLS-39-25; and

Publish the appointees' names following approval by Council at their meeting to be held July 15, 2025.

7.4 Transit Youth Loyalty Pilot Program (CSS-11-25) (CCS) 13 - 18

Authorize the Director of Transit to implement the Youth Loyalty Pilot Program to cap paid transit rides for Youth at 20 paid rides per month between September 1, 2025, to June 30, 2026; and

Authorize the Director of Transit to prepare, for consideration, amendment to Rates and Fees By-law 70-2024 reflecting changes approved through report CSS-11-2025, in the form satisfactory to the Commissioner, Legal and Legislative Services / City Solicitor, or delegate; and

Authorize the Chief Financial Officer to offset the estimated $46,000 cost of the pilot from the Provincial Gas Tax Reserve Fund.

7.5 Red Tape Red Carpet (RTRC) 2025 update (DGM-51-25) (GM) 19 - 29

Receive for information the Red Tape Red Carpet (RTRC) 2025 update contained in development and growth management report DGM-51-25.

7.6 Proposed encroachments into public access easement - 419 Brant Street (DGM-60-25) (GM)

Note: this report will be provided as part of an addendum to the agenda

8. Community and Corporate Services

8.1 2026 financial forecast (FIN-24-25) 30 - 49

Receive for information finance department report FIN-24-25 regarding the 2026 financial forecast as a budget reference document; and

Request the Mayor and Members of Council to consider the contents of the 2026 Financial Forecast including Appendix A when preparing and reviewing the 2026 Proposed Budget.

8.2 Motion memorandum regarding budget 2026 (COW-12-25) 50 - 54

Endorse the attached Mayoral Decisions on the 2026 budget, directing staff to prepare a budget and eliminating the veto period.

9. Confidential Items and Closed Meeting

Confidential reports may require a closed meeting in accordance with the Municipal Act, 2001. Meeting attendees may be required to leave during the discussion.

9.1 Confidential Appendix A to legislative services report LLS-39-25 regarding appointments to the Burlington School Traffic Safety and Mobility Advisory Committee (LLS-39-25)

Pursuant to Section 239(2) (b) personal matters about an identifiable individual, including municipal or local board employees

9.2 Confidential legal report regarding provincial facilitation for Millcroft Golf Course (LLS-41-25)

Pursuant to Section 239(2)(c) a proposed or pending acquisition or disposition of land by the municipality or local board; and

Section 239(2)(f) advice that is subject to solicitor-client privilege, including communications necessary for that purpose

9.3 Confidential legal report regarding potential litigation for aquatics procurement (LLS-42-25)

Pursuant to Section 239(2)(e) litigation or potential litigation, including matters before administrative tribunals, affecting the municipality or local board; and

Section 239(2)(f) advice that is subject to solicitor-client privilege, including communications necessary for that purpose

10. Rise and Report

11. Public Works

11.1 Electric Vehicle Charging Policy and fee options (PWS-02-25) 55 - 66

Approve Option 2 included in public works report PWS-02-25 to implement a $2.00/hour fee for city owned Level 2 electric vehicle chargers for the first four hours of charging, increasing to $5.00/hour for subsequent charging time, and a fee of $10.00/hour for city owned Level 3 (fast) electric vehicle chargers; and

Report back by Q4 2025 with the necessary amendments to the Rates and Fees By-law as well as the Parking and Idling By-law for approval by City Council to implement the fees at a future date; and

Approve the EV chargers on city property corporate policy attached as Appendix A to public works report PWS-02-25.

11.2 Bromley Road area minor reconstruction – additional storm sewer works (PWS-31-25) 67 - 72

Approve additional storm sewer replacement scope for Bromley Road area minor reconstruction (RD-RR-1635) project, including additional funding in the amount of $900,000 from Infrastructure Renewal Reserve Fund, increasing the total project budget to $18,225,254 (net HST).

11.3 2025 Corporate Asset Management Plan (PWS-30-25) 73 - 507

Note: Appendix A can be accessed at burlington.ca/meetings

Approve the City's 2025 Asset Management Plan, attached to public works report PWS-30-25 as Appendix 'A', and

Endorse the approved asset levels of service strategy, as outlined in the 2025 Asset Management Plan; and

Direct the Chief Financial Officer to incorporate the financial requirements identified in the 2025 Asset Management Plan - specifically the recommended 10-year capital investment scenario - into the planned 2027 future Long-Term Financial Plan update, to ensure alignment between asset levels of service and long-range fiscal planning; and

Direct the Director of Engineering Services to publish the 2025 Asset Management Plan on the City's website to ensure transparency and public accessibility, and to notify the Ontario Ministry of Infrastructure in accordance with the requirements of Ontario Regulation 588/17 under the Infrastructure for Jobs and Prosperity Act.

12. Growth Management

12.1 Burlington Agricultural Action Plan (DGM-47-25) 508 - 535

Approve the proposed Burlington Agricultural Action Plan, as provided in Appendix A of development and growth management report DGM-47-25; and

Direct the City Clerk to consider the request of the Burlington Agricultural and Rural Affairs Advisory Committee to include a representative from Burlington Economic Development & Tourism as part of the committee's composition, during the forthcoming terms of reference review for all city advisory committees.

13. Statutory Public Meetings

Statutory Public Meetings will be discussed at 9:30 a.m. on Tuesday, July 8, 2025

13.1 Official Plan Amendment and Zoning By-law Amendments for 35 Plains Road East (DGM-40-25) 536 - 613

Note: this item will be considered at a Special Council meeting immediately following the July 8, 2025 Committee of the Whole meeting

Approve the applications, as modified by staff, for an Official Plan Amendment and a Zoning By-law Amendment submitted by KFA Architects + Planners Inc., on behalf of property owner 2816544 Ontario Inc. for the development of a 13-storey mixed use building consisting of ground floor retail and service commercial uses with 161 residential units above; and

Approve Official Plan Amendment No. 162 to the City of Burlington Official Plan 1997, as outlined in Appendix D of development and growth management report DGM-40-25, to amend the designation at the lands located at 35 Plains Road East as “Mixed Use Corridor – Commercial Corridor” with site-specific policies; and

Deem that the Official Plan Amendment No. 162 is consistent with The Planning Act; and

Instruct the City Clerk to prepare the necessary by-law adopting Official Plan Amendment No. 162 as outlined in Appendix D to development and growth management report DGM-40-25 to be presented for approval at the same time as the associated by-law to amend Zoning By-law 2020, as amended, for the development proposal; and

Approve Zoning By-law 2020.507, attached as Appendix E to development and growth management report DGM-40-25, to rezone the “MXC-470” zone to “H-MXC-565” as amended for the lands at 35 Plains Road East; and

Deem that Zoning By-law 2020.507 will conform to the Halton Region Official Plan, the 1997 Official Plan of the City of Burlington and the 2020 Official Plan once Official Plan Amendment No. 162 are adopted; and

State that the amending zoning by-law will not come into effect until Official Plan Amendment No. 162 is adopted.

13.2 Zoning By-law Amendment for 1510 and 1515 North Service Road and 2202-2208 Industrial Street (DGM-52-25) 614 - 646

Approve the application for a Zoning By-law Amendment as modified by staff in development and growth management report DGM-52-25, to add one Convenience/Specialty Food Store and add Recreational Establishments to the CE-33 and CE-34 zones, and add Restaurant Uses and Veterinary Services to the CE-33 zone; and

Approve Zoning By-law 2020.508 attached as Appendix D to development and growth management report DGM-52-25, to amend the “CE-33” and “CE-34” zoning of the lands at 1510 and 1515 North Service Road and 2202-2208 Industrial Street; and

Deem that Zoning By-law 2020.508 conforms to the Halton Region Official Plan, the 1997 Official Plan of the City of Burlington and the 2020 Official Plan and that there are no applications to alter the Official Plans with respect to the subject lands.

14. Information Items

15. Staff Remarks

16. Committee Remarks

17. Adjournment

Information Report Summary

SUBJECT: 2025 Capital Variance and Project Closure

TO: Committee of the Whole

FROM: Finance
N/A

Report Number: FIN-19-25

Wards Affected: All

Date to Committee: July 7, 2025

Date to Council: July 15, 2025

Recommendation:

Receive for information finance department report FIN-19-25 regarding the 2025 capital variance and project closure.

Executive Summary

This report outlines the financial status of the City's capital program and identifies 63 capital projects ready for closure as of May 31, 2025.

Purpose of report:

As part of the ongoing capital project management, staff review the status of all open projects to ensure that as projects are completed and an asset goes into service, they are closed. The reporting of capital variances is in accordance with Delegated Authority By-law 71-2023, as amended.

Key findings:

The City has 591 open capital projects. Of these, staff have identified 63 projects with a net positive variance totaling $1.8 million that are ready to be closed.

Background

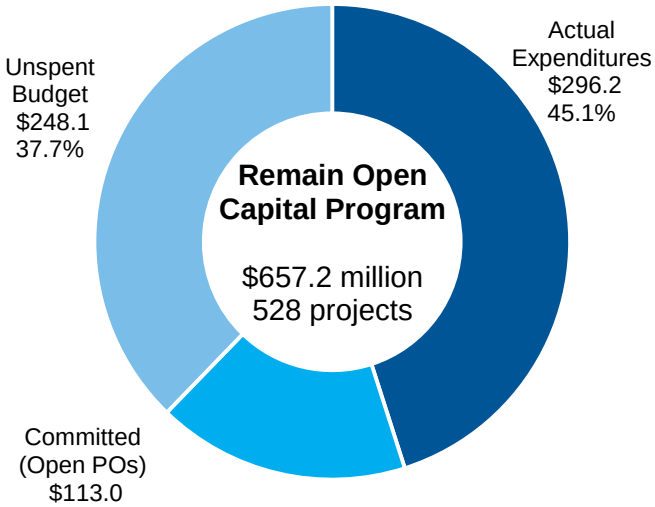
Unlike expenditures reflected in the operating budget, capital projects do not close on an annual basis. The capital projects are closed following the completion of all work and when all costs and financing have been finalized. The time between identifying the need for a capital project to its final completion can span a number of years for a major project. This report outlines the financial status of the City's capital program as of May 31, 2025.

Capital Project Analysis

The City has 591 open capital projects with a total approved budget of $723.5 million. Of these open capital projects, staff have identified 63 capital projects with a total approved budget of $66.3 million, or 9.2% of the total program, to be closed.

	Total	Open	Closed
Number of Projects	591	528	63
Percentage of Total Capital Program		89.3%	10.7%
Budget (in millions)	$ 723.5	$ 657.2	$ 66.3
Percentage of Total Capital Program		90.8%	9.2%

The following chart provides the status of the $657.2 million budget of the 528 projects to remain open. Of the $657.2 million budget, $409.2 million or 62.3% has either been spent or committed through purchase orders (POs). Therefore, the unspent budget in the projects to remain open is $248.1 million or 37.7%, reflecting the multi-year nature of the capital projects.



Numbers are in millions and may not add due to rounding

Variance Analysis

There are 60 (95.2%) of the 63 capital projects ready for closure with favourable variances totaling approximately $1.9 million. The favourable variance of $1.9 million is partially offset by the remaining three capital projects having unfavourable variances totaling approximately $0.08 million, resulting in an overall net positive variance of $1.8 million.

Unfavourable Variances

Of the 63 capital projects ready for closure, there are no projects with an unfavourable variance greater than the $100,000 reporting threshold.

Implications

The net transfer back to the City's reserve funds as result of the closure of 63 capital projects is $1.8 million.

Further details are provided in the chart below:

Reserve Fund	Amount
Capital Purposes	$ 74.6
Infrastructure Renewal	755.5
Information Technology Renewal	19.6
Growth Studies Development Charge	13.3
Transportation Development Charge	509.7
Park Dedication	48.4
Canada Community–Building Fund	27.0
Future Services	301.6
Parking Renewal	7.0
Policy Initiatives	36.4
Total	**$ 1,793.1**

* Numbers are in Thousands and may not add due to rounding

Strategic Alignment

- ☐ Designing and delivering complete communities
- ☐ Providing the best services and experiences
- ☐ Protecting and improving the natural environment and taking action on climate change
- ☑ Driving organizational performance

Author:

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Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Recommendation Report Summary

SUBJECT: Appointment to Downtown BIA Board of Directors

TO: Committee of the Whole

FROM: Legal and Legislative Services

Legislative Services

Report Number:LLS-38-25

Wards Affected: 2

Date to Committee: July 7, 2025

Date to Council: July 15, 2025

Recommendation

Appoint the following member to the Burlington Downtown Business Association (BDBA) Board of Directors for a term to expire July 2033 or upon appointment of their successor:

- Kimberley Nadherny

Executive Summary

The purpose of this report is to provide Council with the name of the individual recommended to fill a vacancy on the Burlington Downtown BIA Board of Directors. The Municipal Act, 2001 states in section 204 (3) that anyone selected by the BIA for the Board must be appointed by the municipality.

Background

The Burlington Downtown Business Association (BDBA) was established in 1979 with 7 board members. In July 2023 the membership composition was amended to up to twelve members, including one member of Council.

The Municipal Act, 2001 states in section 204 (3) that anyone selected by the BIA for the Board must be appointed by the municipality:

"**Composition**

(3) A board of management shall be composed of,

(a) one or more directors appointed directly by the municipality; and

(b) the remaining directors selected by a vote of the membership of the improvement area and appointed by the municipality. 2001, c. 25, s. 204 (3)."

At the June 4, 2025, meeting for the Board of Directors the following individual was approved by the Board:

- Kimberley Nadherny

Analysis

The Board appointments are conducted by the Burlington Downtown Business Association and require Council endorsement. The board will be informed once the member has been approved by Council. Further communications regarding membership are the responsibility of the Board. Through the work to review and develop this report, staff have connected with the BIA administration. Maintaining this working relationship will support the day-to-day governance of this board.

Recommendation Details

Directors are appointed to the BDBA Board for a term of two consecutive 4-year terms from the time of appointment, per the terms of the BDBA Constitution. With this appointment, the BDBA Board will be at a full complement of 12 members.

Key Dates & Milestones

At the June 4, 2025, meeting of the Board Directors Kimberley Nadherny was approved for Directorship by the Board. The term will come into effect at the time of appointment and will end July 2033.

Strategic Alignment

- ☐ Designing and delivering complete communities
- ☑ Providing the best services and experiences
- ☐ Protecting and improving the natural environment and taking action on climate change
- ☐ Driving organizational performance

Author:
Lisa Palermo
Manager of Committee Services
Lisa.palermo@burlington.ca

Appendices:
A. Letter from Downtown BIA regarding member appointments

Notifications:
Brian Dean, Executive Director, Burlington Downtown Business Association
brian@burlingtondowntown.ca

Report Approval:
All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

BURLINGTON DOWNTOWN

Friday June 13th, 2025

Lisa Palermo
Clerk's Department, City of Burlington
426 Brant Street, Burlington. L7R 3Z6

Dear Ms. Palermo,

I'd like to advise you of the recent decision by the Burlington Downtown Board of Directors at their meeting of Wednesday June 4th, 2025. At that meeting the following individual was approved for Board Directorship:

Kimberley Nadherny
Son of a Peach Pizzeria
2049 Pine Street, #62
Burlington, ON L7R 1E9

We appreciate this Board-approved Director being considered for appointment by City Council. The tenure of a BDBA Board volunteer, after appointment by City Council, is two consecutive terms of four (4) years.

Please reach out if you have additional questions.

With thanks,

Brian Dean, Executive Director

Recommendation Report Summary

SUBJECT: Appointments to the Burlington School Traffic Safety and Mobility Advisory Committee

TO: Committee of the Whole

FROM: Legal and Legislative Services

Legislative Services

Report Number: LLS-39-25

Wards Affected: All

Date to Committee: July 7, 2025

Date to Council: July 15, 2025

Recommendation

Approve the appointments to the Burlington School Traffic Safety and Mobility Advisory Committee, as contained in confidential Appendix A to legislative services report LLS-39-25; and

Publish the appointees' names following approval by Council at their meeting to be held July 15, 2025.

Executive Summary

Purpose of report:

The purpose of this report is to provide Council with the names of individuals recommended for appointment to the Burlington School Traffic Safety and Mobility Advisory Committee.

The establishment of the Burlington School Traffic Safety and Mobility Committee was approved by Council on March 18, 2025, through public works report PWS-09-25. The recommended starting date for this committee is September 2025.

Background

The City of Burlington has a variety of boards and committees that provide feedback on city projects and issues in the community. Members of the public aged 18 and older, who represent the diverse backgrounds of the community, are encouraged to take part.

The establishment of the Burlington School Traffic Safety and Mobility Committee was approved by Council on March 18, 2025, through public works report PWS-09-25. This committee will provide a clear process for reviewing school traffic and mobility concerns, ensuring that key stakeholders are involved, help to address concerns efficiently and support safer school environments across Burlington. The voting members for this committee are comprised of 4 to 9 resident members, 1-2 Trustee(s) from the Halton District School Board (HDSB) and 1-2 Trustee(s) from the Halton Catholic District School Board (HCDSB). The recommended starting date for this committee is September 2025.

Legislative Services staff launched a recruitment campaign for the resident members of the Burlington School Traffic Safety and Mobility Committee on May 5, 2025. The recruitment campaign deadline was extended to May 30, 2025, to allow for more applications to be submitted.

Recruitment opportunities were advertised on the City's website, the Get Involved Burlington newsletter, through social media boosts, Councillor newsletters, LinkedIn and bookmarks. In response to the recruitment, 7 applications were received from individuals expressing an interest in participating on the above noted committee.

In accordance with the Public Appointment Policy, the recommended appointments will expire on December 31, 2026, to align with the current term of Council.

The interview panel consisted of Chris King (Manager of Transportation Operations), Bryan Letourneau (Supervisor of School Crossing Guards) and Councillor Lisa Kearns. The interviews were conducted via Zoom providing more flexibility for participation by the interview panel and applicants.

Analysis

The interview panel made their selection recommendations based on the committee's terms of reference and membership composition needs as well as the applicant's knowledge of the role, relevant skills and experience, expressed dedication/commitment, time availability, and communication skills.

Recommendation Details

Following a recruitment and interview process of qualified applicants, members of the community are being recommended for appointment to the Burlington School Traffic Safety and Mobility Committee.

As a member of one of the City's advisory committees, residents can actively participate in local government. Committee members play an important role in shaping city initiatives, by working with staff and the community to contribute to improving the quality of life within the City of Burlington.

Key Dates & Milestones

Regular meeting of Council on July 15, 2025 – appointment approval

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Implications

Following Council approval of the recommendation, staff will advise successful and unsuccessful applicants of Council's decision. Successful applicants will participate in future committee meetings as voting members. They will be provided with an orientation session and resources materials. All members of advisory committees and boards are required to complete training in the areas of AODA, Privacy, Health & Safety, Respect in the Workplace, and Code of Conduct.

Individuals who are not appointed will be advised of other City of Burlington volunteer opportunities and that their application will be held to the end of the year.

References

- PWS-09-25 Establishment of Burlington School Traffic Safety & Mobility Committee
- CL-26-21 Public Appointment Policy

Strategic Alignment

- ☑ Designing and delivering complete communities
- ☑ Providing the best services and experiences
- ☐ Protecting and improving the natural environment and taking action on climate change
- ☐ Driving organizational performance

Author:

Jo-Anne Rudy
Committee Clerk
jo-anne.rudy@burlington.ca

Appendices:

A. Confidential appendix – recommended committee appointees

Pursuant to Section 239(2)(b) personal matters about an identifiable individual, including municipal or local board employees

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Recommendation Report Summary

SUBJECT: Transit Youth Loyalty Pilot Program
TO: Committee of the Whole
FROM: Community Services
Transit
Report Number: CSS-11-2025
Wards Affected: All
Date to Committee: July 7, 2025
Date to Council: July 15, 2025

Recommendation

Authorize the Director of Transit to implement the Youth Loyalty Pilot Program to cap paid transit rides for Youth at 20 paid rides per month between September 1, 2025, to June 30, 2026; and

Authorize the Director of Transit to prepare, for consideration, amendment to Rates and Fees By-law 70-2024 reflecting changes approved through report CSS-11-2025, in the form satisfactory to the Commissioner, Legal and Legislative Services / City Solicitor, or delegate; and

Authorize the Chief Financial Officer to offset the estimated $46,000 cost of the pilot from the Provincial Gas Tax Reserve Fund.

Executive Summary

Purpose of report:

- The purpose of this report is to seek approval to implement a Youth Loyalty Pilot Program for Burlington Transit youth (aged 13 to 19 years) riders from September 1, 2025, to June 30, 2026.
- To obtain approval to amend the Rates and Fees by-law to address the Youth Loyalty Pilot Program.

Key findings:

- Youth Loyalty Pilot Program will start September 1, 2025.
- Limiting the paid rides for youth riders at 20 paid rides for a total monthly cost of $38 per youth rider.
- Pilot project will run until June 30, 2026.
- Work with finance to evaluate options for longer-term financial sustainability should the program be made permanent.

Implications:

- Financial:
    - The total revenue impact is estimated at $46,000.
        - The estimated fare loss associated for capping youth fares, at $38 per month, is approximately $32,000 per year.
        - The anticipated fare loss related to the SPLIT reimbursement, from the Region of Halton, is approximately $14,000 per year
- Legal:
    - The rates and fees bylaw to be updated to reflect the changes to the youth program outlined in this report.

- Communications:
    - A communications and marketing plan to promote the Youth Loyalty Program will be launched in Summer 2025, ahead of the program's start date.

Background

On December 10, 2024, as a follow up to TR-02-2024, Council was informed, via memo, on the plan to cap monthly transit fares for youth riders from 40 paid rides to 20 paid rides. In this approach, youth fares would be capped after 20 paid rides, therefore reducing the cost of transit from $76 per month to $38 per month. The memo outlined the proposed approach, including associated impacts, and an initial implementation plan targeting Q2 2025.

The recommended implementation date is updated to September 1, 2025, following the youth summer 2025 (July and August) pilot project. This timing allows for a more seamless integration of youth fare strategies and further supports the goal of encouraging increased youth ridership overall.

Analysis

Transit fare capping, or loyalty programs, are proven tools to encourage transit ridership while supporting fiscal responsibility. These programs also support equity among those who rely on transit, as it lowers the cost per month. Loyalty programs rely on the presence of a fare card system, such as PRESTO, which enables accurate tracking of monthly usage by age-based concession(s). This functionality helps mitigate the risk of fare evasion, ensures accurate fare capping, and supports cross-boundary travel, including free transfers to GO Transit, Hamilton and Oakville Transit, when paying a fare on Burlington Transit. It is anticipated that more youth will use transit to go to and from school, which may cause capacity challenges on some routes, particularly towards the end of the month, when fares are capped. Youth ridership makes up approximately 25 to 30% of afternoon rush hour boardings from 2pm to 3pm.

The benefits of a transit loyalty program include:

- Encouraging positive transit travel behaviour among youth and encourage lifelong transit usage.
- Youth may choose transit as a more attractive option if overall costs are reduced and lead to more frequent travel once they exceed paid rides.
- When youth riders choose transit, it is better for the environment.
- Supports youth independence, employment, extracurricular activities and social connections.
- Taking transit to and from school, may lead to fewer cars travelling within school zones.
- This initiative supports the City’s strategic goals to increase the modal split and ensures equity and inclusivity in our delivery of transit service.

The pilot program complements existing free transit for youth on evenings and weekends and will benefit riders who use transit frequently.

Potential risks for this program include:

- Sustainable long-term funding to support the program in the future.
- Capacity challenges on school routes, especially near the end of the month when youth riders exceed their 20 paid rides.

Recommendation Details

It is recommended to pilot this program starting on September 1, 2025, and continuing to June 30, 2026. The total estimated cost of the pilot is $46,000 and would be funded through the Provincial Gas Tax Reserve Fund.

This pilot project allows staff to monitor program usage, ridership and assess the full financial impact. Should the program be considered for permanent implementation, a sustainable, long-term funding source is required. Transit staff will report back on the results of the pilot in the summer of 2026.

Key Dates & Milestones

The following key dates outline Burlington Transit's Youth Fare Program:

- September 1, 2025 – Start of Youth Tap 20 Loyalty Program Pilot
- June 30, 2026 – End of Youth Tap 20 Loyalty Program Pilot

Implications

Financial:

In 2024, youth ridership generated approximately $620,000. This includes:

- Fares paid directly by youth riders,
- Contributions from the school boards; and
- Equally shared contributions from the Region of Halton (50% subsidy for SPLIT).

For the proposed youth loyalty program, revenue loss is estimated as follows:

- $32,000 from youth riders using transit greater than 20 times per month
- $14,000 reduced SPLIT contributions from the Region of Halton.

The total estimated financial impact is approximately $46,000.

Legal:
The rates and fees bylaw to be updated to reflect the changes to the youth loyalty program and reviewed in this report.

Climate:
The youth loyalty initiative encourages youth riders to use transit more frequently. Youth riders who exceed 20 rides in a month may choose transit over car rides, helping to reduce greenhouse gas emissions.

Communication:
The Youth Tap into Free program will be promoted throughout the summer 2025. Key messages include:

- Tap into Free → 20 Paid Rides = Free
- Tap into Freedom with your PRESTO card

A PRESTO card is required to participate in the program.

Engagement:
Burlington Transit has actively engaged with youth, including:

- Consulting Burlington's Youth Advisory Committee
- Participating in Youth Week (May 1-7, 2025).
  - Visiting community centres (Haber, Tansley Woods and Mountainside); and
  - Distributing over 500 free PRESTO cards.

Burlington Transit staff also engaged with the Halton Student Transportation Services, Halton District School Board, Halton Catholic School Board and the Region of Halton.

References

TR-02-2024 Fare Free Transit Study
Follow up to TR-02-2024 – Transit Fare Capping for Youth Riders

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Strategic Alignment

☐ Designing and delivering complete communities
☑ Providing the best services and experiences
☑ Protecting and improving the natural environment and taking action on climate change
☐ Driving organizational performance

Author:

Catherine Baldelli
Director, Transit
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Appendices:

None.

Draft By-laws for Approval at Council:

- By-law 70-2024 amended for approval to Council on July 15, 2025.

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Recommendation Report Summary

SUBJECT**:** Red Tape Red Carpet (RTRC) 2025 update

TO: Committee of the Whole

FROM: Development and Growth Management

Community Planning

Report Number: DGM-51-25

Wards Affected: all

Date to Committee: July 7, 2025

Date to Council: July 15, 2025

Recommendation

Receive for information the Red Tape Red Carpet (RTRC) 2025 update contained in development and growth management report DGM-51-25.

Executive Summary

This report provides an update on the Red Tape Red Carpet (RTRC) initiative. Originally launched in 2019 through Report CM-24-19 and updated in 2023 (ECDEV-04-24), the initiative sought to eliminate barriers to business and development in Burlington. This report confirms that nearly all original recommendations have been either fulfilled, embedded into standard operations, or addressed through broader process improvements. As RTRC-specific efforts conclude, the work continues through ongoing coordination, customer-focused development facilitation, and integrated performance tracking across city departments.

Purpose of report:

To provide Council with an update on the Red Tape Red Carpet (RTRC) initiative and demonstrate how its principles have been embedded into citywide development operations. This includes highlighting how staff now deliver services with a focus on coordination, transparency, and customer experience

Key findings:

- The Red Tape Red Carpet (RTRC) initiative has transitioned from a targeted task force to an embedded citywide operational model. Its principles now inform how city staff deliver planning, permitting, and customer experience services.
- RTRC outcomes are now reflected in structured processes such as the Streamlined Development Application Process (SDAP), proactive navigation support, and early issue identification across departments.
- Industry-specific forums like the Housing Development Liaison Committee (HDLC) and Lunch & Learn events have become platforms for two-way dialogue and process improvements.
- The business concierge model is now embedded within staff functions through two dedicated roles as well as a fully staffed One Window counter, offering in-person navigation and development support.
- City staff are actively using dashboards and digital tools to track relevant metrics and manage file timelines, further enhancing transparency and internal coordination.
- The initiative has improved clarity, timeliness, and customer experience across application touchpoints, and is now a foundational part of how development services are delivered

Implications:

- Financial, Legal, Climate: None Identified
- Human Resources: RTRC-aligned practices have been embedded into training, onboarding, and internal service culture, and existing staff functions have evolved
- Communications: No new efforts beyond existing processes
- Engagement: Ongoing industry engagement is supported through RTRC coordinated mechanisms (Pipeline to Permit, HDLC, SDAP) and One Window Service Counter, and supported by cross-departmental collaboration from Planning, Building and Customer Experience leadership and staff.

Background

The Red Tape Red Carpet (RTRC) initiative was launched in 2019 through Report CM-24-19, in response to barriers raised by Burlington's business and development community. Led by the Mayor's Office, the RTRC Task Force identified over 22 recommendations focused on improving permitting timelines, digital access, interdepartmental coordination, and customer service.

Report ECDEV-05-23 provided a status update on the implementation of these recommendations, highlighting completed actions, ongoing initiatives, and areas needing further work, adding additional recommendations, with emphasis on customer service improvement.

Report ECDEV-04-24 outlined how legislative changes, internal restructuring, and tools such as the Streamlined Development Application Process (SDAP) were supporting a more coordinated and efficient development review process.

Collectively, these reports reflect the City's shift from a task force initiative to an embedded operational model, where RTRC will continue to inform how City staff deliver planning, permitting, and business support services.

While this report focuses on the recommendations endorsed by Council, it is important to acknowledge that broader transition work remains underway. The conclusion of regional economic development services has left notable service gaps, particularly for agricultural businesses and rural small business support. These needs, previously addressed through regional programs, remain a priority for the City and have been flagged through BARACC and other forums. Future reporting will provide Council with a more comprehensive update on the City's realignment efforts and partnership discussions related to these services.

Analysis

1. From Fulfillment to Evolution

The RTRC initiative laid the groundwork for how city staff deliver planning and permitting services today. These are foundational principles that have shaped staff and applicant interactions:

- **MyFiles Portal:** Launched in 2023, this tool allows applicants to track their application status in real time. It supports transparency by reducing uncertainty and decreasing status inquiries.

- **Structured intake and Pre-Consultation:** RTRC's recommendation to improve early coordination now lives through formalized pre-consultation. Planning, engineering, zoning and building teams meet early to identify gaps and support complete application submissions. This approach strengthens file readiness and ensures there's no rework.

- **Customer Service Culture:** Customer Experience (CX) practices initiated under RTRC are now embedded in staff training, onboarding, and service delivery. Teams guide applicants and collaborate to resolve issues early and often.

- **Business Navigation & Concierge Support:** RTRC's recommendation to have navigation support has resulted in successful implementation of dedicated roles and accessible service channels. There are now staff roles to support applicants through medium-to-small scale and high-impact development files. In addition to these roles, City Hall now offers a fully staffed "One Window" counter, an in-person service desk where applicants can receive coordinated support from planning, building and zoning staff.

Among the most tangible outcomes of RTRC has been the formal introduction of roles focused on high-impact development files. Business navigation and customer experience functions were created to guide applicants through the regulatory process and ensure consistent support across departments. These roles have now become central to how the City delivers complex development support, reflecting the legacy of RTRC.

2. Implementation Outcomes – Where RTRC Recommendations Are Now Sustained

These outcomes reflect how RTRC-aligned practices have become operationalized within standard workflows. These are ongoing outcomes that staff continue to sustain, monitor and refine:

- **Zoning and Approval Timelines:** The original target was a 30-day goal for minor applications. While provincial legislation now mandates 60 days, city staff consistently meet or exceed this timeline through internal coordination and proactive issue management.

- **Streamlined Zoning and Development Approvals:** Significant strides have been made through the Streamlined Development Application Process (SDAP), which enhances coordination between Planning, Building, and Zoning. It has improved handoffs, reduced delays, more timely review cycles, and clarity at intake.

- **Industry Coordination and Proactive Stakeholder Management:** City staff now regularly engage with industry partners and stakeholders through the Housing Development Liaison Committee (HDLC). This cross-functional forum brings together representatives from Planning, Building, Zoning, CX and other departments to collaborate and address reoccurring issues and align on service expectations. HDLC has become a platform for two-way dialogue with organizations such as BILD and Landscape Ontario. It enables city staff to hear directly from larger applicants, identify root causes of issues they may be facing, and address them, as well as build on existing relationships with partners and organizations.

3. RTRC Principles as Foundation for Culture Change

City staff continue to apply RTRC principles not as standalone tasks but as part of a broader shift in how the City approaches development, permitting and customer service. This culture change is evident in:

- **Coordinated Navigation:** Early coordination and shared accountability across Planning, Building, Zoning and CX teams for complex files

- **Two-Way Industry Dialogue**
  Mechanisms like HDLC and other educational events have become key feedback and engagement tools

- **Data Driven Practices:** The City now uses internal dashboards and metrics to track timelines, identify gaps, and improving efficiency and service metrics. What began as static tracking has evolved into a system of proactive service management.

4. Next Steps

City staff will continue to apply RTRC-aligned principles to improve development facilitation and customer experience. This includes supporting complex files, ensuring early issue resolution, providing consistent staff touchpoints, and maintaining structured applicant navigation.

- The City also continues to gather and evaluate feedback from applicants and industry partners to inform future improvements. Testimonials and engagement data from customers, such as satisfaction scores or resolution rates, will support a more data-informed approach to service design. These insights will be included in future reporting, helping to shape an ongoing culture of responsiveness and continuous service enhancement

  Ongoing efforts will include:
  - Expanding the use of data-driven dashboards
  - Strengthening cross-departmental processes through SDAP
  - Maintaining regular industry engagement and education sessions
  - Supporting applicants through business navigation and coordination across departments

5. Conclusion

The Red Tape Red Carpet initiative has evolved from a focused task force effort into a sustained, organization-wide approach to service delivery. Its principles, such as early coordination, improved customer service, and interdepartmental alignment, are now embedded in how the City of Burlington staff support all types of development and business needs. Whether supporting large developments or small-scale inquiries, the culture of continuous improvement, customer-centered service, and interdepartmental alignment is now reflected in daily practice.

Recommendation Details

THAT Council receive Report DGM-51-25, providing update on the status and ongoing influence of the Red Tape Red Carpet (RTRC) initiative.

Key Dates & Milestones

- 2019 – RTRC initiated via Report CM-24-19
- 2023 – Interim update via Report ECDEV-05-23
- 2024 – Expanded status and modernization via Report ECDEV-04-24
- 2025 – RTRC update via Report DGM-51-25

Implications

• Financial: None
• Legal: None
• Human Resources: Roles related to RTRC navigation have been fulfilled
• Communications: Ongoing updates to industry groups through education sessions and relevant communications
• Engagement: Continued engagement through HDLC and One Window service counter, supported by cross-departmental collaboration between Planning, Building and Customer Experience
• Climate: None

References

MO-06-19

CM-24-19

ECDEV-05-23

ECDEV-04-24

Strategic Alignment

☐ Designing and delivering complete communities
☑ Providing the best services and experiences
☐ Protecting and improving the natural environment and taking action on climate change
☑ Driving organizational performance

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Appendices:

A. RTRC Updates DGM-51-25

Draft By-laws for Approval at Council:

- N/A

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Red Tape Red Carpet Recommendations			
Status of Recommendations (Report ECDEV-04-24 and CM-24-19)			
Status	**Recommendation**	**Description**	Notes
Fulfilled	**Expand "My files" online portal**	Enhance portal to support more application types and provide end-to-end tracking of application	(MyFiles) was created through the SDAF project. SDAP has confirmed the need to broaden this functionality across all development applications to enhance the customer experience, make process more transparent, and automate some of the work from staff. Conversations with BDS are ongoing to implement.
Fulfilled	**Implement High Impact Critaria**	Develop critaria to identify and prioritize development proposals that address critical needs, such as affordable housing and significant employement growth.	Critaria were developed and are now used to identify and prioritize development proposals with significant community benefits, incuding housing and major employment projects. This has improved transparency in decision-making and ensured more strategic allocation of staff resources.
Fulfilled	**Refocus Customer Experience Manager Role**	Shift role to concentrate on high impact files, process improvements and customer engagement and education	The Manager of Customer Experience role was established and resulted improved resolution timelines and more consistent support for applicants.
Fulfilled	**Redevelop Special Business Area Coordinator Role**	Transform the role into Specialist, Business and Economic Development focusing on strategy development for mainstreet business and Business Improvement Areas (BIAs)	The Specialist, Business & Economic Development role was established and now leads strategy development for mainstreet businesses and acts as a BIA liason, supporting improved coordination between departments and assisting to accelerate permit related issue resolution.
Fulfilled	**Joint Engagement and Development Community**	Collaborate with organizations like West End Home Builders Association (WEHBA), and Builidng Industry and Land Development Association (BILD) to engage the development community	Ongoing engagement with the development community is supported through forums such as HDLC, P2P, technical advisory groups, and targetted education sessions (ie.Building Dept Lunch & Learn). These initatives have helped clarify approval processes and strengthen trust with industry stakeholders.
Ongoing	**Focus on Investment Attraction**	Continue efforts to attract strategic investments aligned with Burlington's economic priorities.	Investment attraction efforts are ongoing through city-supported missions and initiatives in collaboration with regional and external partners.
Ongoing	**Reinitiate One Brand Project**	Advance a coordinated branding initative aimed at unifying the city's value for residents, businesses and visitors.	Branding discussions have resumed under Corporate Affairs as part of a broader strategic communications and positioning work.
Ongoing	**Refine Community Planning Permit System**	Develop a rapid and predictable planning process, including flexibility to support increased housing and amenities	Approved in principle by council, awaiting Province approval of OPA2. Staff are currently advancing CPP by-law framework.
Ongoing	**Leverage Federal Housing Accelerator Fund (HAF)**	Utilize approximately $2.1 Mil from fund to implement seven key initiatives supporting housing development	Council-approved implementation is underway. Staff have presented report outlining how HAF resources will support CIP. Incentives include fee waivers and forgivable loans to encourage ARUs.
Fulfilled	**Engagement with Landscape Ontario**	Engagement with Landscape Ontario to address industry specific concerns and opportunties	Ongoing engagement with industry partners has resolved issues through education sessions and process improvements.

Red Tape Red Carpet Recommendations			
Status of Recommendations (Report ECDEV-04-24 and CM-24-19)			
Fulfilled	**Establish Pipeline to Permit Committee**	Create a committee to provide semi-annual reports on progress in reducing red tape and facilitating investments	Committee has been created for council and staff to effectively meet, bring forward and track complex files and discussions and resolve them collaboratively. This process is supported by a live, real-time dashboard that allows visibility and transparency of development data.
Fulfilled	**Chief of Business Development**	Establish a position at City Hall to act as the primary outreach for attracting new businesses, overseeing and expediting applications, and reporting progress to City Council and the City Manager.	The Manager of Customer Experience and Planning staff lead on outreach, expediting, and oversight of development applications. The Specialist, Business and Economic Development supports similar functions for small business files. KPIs are being developed to monitor application processing times. Economic Development supports business attraction, while Building & Planning staff coordinate with the Manager or Specialist based on file scope and complexity.
Fulfilled	**Key Performance Indicators (KPIs)**	Develop and implement targets and KPIs, including timelines for processing business applications, for all staff in planning, building, and development teams.	Staff are updating AMANDA and introducing technology enhancements to extract KPI data for a performance dashboard. KPIs are already complete but more work in the technical elements is currently in progress through BDS
Ongoing	**Review Agribusiness Rules, Zoning, and Definitions and Agriculture liason**	Review zoning and OP policies related to agriculture, agribusiness and agri-tourism to better support innovation and business success in Burlington's rural areas.	Official Plan updates addressing rural and agricultural areas are underway to align with recent legislative changes. Zoning updates will follow. A strategy regarding the transition of agricultural responsibilities from Halton Region will be presented to Council in Q3 2025.
Fulfilled	**Target Completion of Minor Site Plan Reviews and Zoning Clearances within 30 Days**	Definition has changed from original and it’s no longer 30 but 60	Zoning and Site Plan are distinct processes. City staff consistently meet the 60-day legislative timeline for site plan reviews. The main challenge with 30-day zoning clearance targets is applicant accuracy. Staff are working on tools to improve submission quality and developing dashboards to visualize performance data
Fulfilled	**Streamline Zoning and Approval Processes**	Optimize zoning, site grading, and Committee of Adjustment processes for faster execution and resolution.	The low-density pre-building approval process has been streamlined through SDAF. SDAP is currently working on applying similar improvements for high-density and complex planning applications.
Fulfilled	**Website Optimization**	Enhance the City of Burlington website with relevant, informative, and easily accessible content to support businesses.	Communications and Planning staff continue to modernize application forms, web content, and submission materials to enhance usability. The Building Department has updated online directives and FAQs to support applicants.
Fulfilled	**Online Application Portal**	Implement improved customer service technology, including a self-serve online portal for applicants to submit and track applications.	A limited version of MyFiles was implemented through SDAF. Broader development is ongoing to improve customer transparency and reduce low-value staff work. Current version excludes building permits.
Ongoing	**Development Application Review Team**	Establish a team to review and provide feedback on development applications before formal submission.	The role of pre-consultation has evolved to support applicant success. While no longer mandatory, it is strongly encouraged. SDAP is refining the process to add value and improve submission quality.

Red Tape Red Carpet Recommendations			
Status of Recommendations (Report ECDEV-04-24 and CM-24-19)			
Fulfilled	**Customer Service Training**	Provide customer service training for all staff involved in business development processes.	A multi-departmental service counter has been established at City Hall to provide applicant support across departments. A CX team supports this function, and service culture is embedded across teams.
Fulfilled	**Business Feedback Mechanism**	Create a mechanism for businesses to provide feedback on their experiences with City processes.	A centralized development portal is in progress to streamline applicant interaction
Fulfilled	**Development Charges Review**	Conduct a review of development charges to ensure they are competitive and fair.	Watson & Associate's Development Charges Review 2024 completed in May 2024 through report F-04-24
Fulfilled	**Community Improvement Plans (CIPs)**	Develop CIPs to encourage desired development and revitalization in targeted areas.	A new CIP program has been approved by Council and an implementation update was given April 2025 through DGM-33-25.
Fulfilled	**Business Concierge Service**	Establish a concierge service to guide businesses through City processes.	Customer Experience roles are active and supporting applicant journeys across file complexity levels.
Fulfilled	**Branding Strategy**	Develop a clear vision and associated branding strategy for business attraction and development	This is lead by Corporate Communications with contributions from regional and external partners.
Fulfilled	**Chief Salesperson Role**	Empower the Mayor and Councillors as chief salespeople for Burlington, promoting the city to potential investors. Develop and implement a business retention and expansion strategy.	The Mayor and Council continue to promote Burlington as a prime location for investment, with staff support in advancing a cohesive investment attraction narrative.
Fulfilled	**Business Retention and Expansion**	Develop and implement a business retention and expansion strategy.	Led by staff responsible for economic development facilitation with a focus on retention through direct business support and local intelligence gathering. This is also supported through regional and external partnerships.
Fulfilled	**Red Carpet Program**	Develop a program to celebrate and welcome new businesses to Burlington	Delivered through collaboration between Customer Experience staff and external agencies.
Ongoing	**Business Advocacy**	Advocate for business-friendly policies at regional, provincial, and federal levels.	Business advocacy continues through varous channels including intergovernmental engagement, participation in regional economic discussions and ongoing collaboration across city departments to represent business needs and priorities.
Fulfilled	**Transit and Transportation Improvements**	Explore Opportunities to Use City Parking Supply as Leverage for Business Attraction	Downtown Parking Plan through Transportation Department
Fulfilled	**Innovation and Entrepreneurship Support**	Support innovation and entrepreneurship through programs and partnerships.	Tech Place
Fulfilled	**Red Tape Reduction Advocacy**	Advocate for the reduction of regulatory burdens that hinder business development.	A new zoning by-law is being written with a focus on simplification and alignment. Other regulatory improvements are under continuous review.
Fulfilled	**Performance Reporting**	Regularly report on the progress of implementing RTRC recommendations	Staff are developing KPIs and dashboards to track performance and reinforce accountability in customer service and continuous improvement.

Information Report Summary

SUBJECT: 2026 financial forecast

TO: Committee of the Whole

FROM: Finance

Report Number: FIN-24-25

Wards Affected: All

Date to Committee: July 7, 2025

Date to Council: July 15, 2025

Recommendation:

Receive for information finance department report FIN-24-25 regarding the 2026 financial forecast as a budget reference document; and

Request the Mayor and Members of Council to consider the contents of the 2026 Financial Forecast including Appendix A when preparing and reviewing the 2026 Proposed Budget.

Executive Summary

This report provides Council with an overview of the known and estimated financial pressures impacting the City. It outlines the costs to maintain current service levels and recommends investments in key service areas to achieve Council's strategic goals.

The Multi-Year Simulation (5 years) provides a detailed overview of major budget drivers and expected future tax rate impacts. This is attached as Appendix A and discussed in detail throughout this report.

When developing the 5-year budget simulation model, staff considered many factors including:

- Known inflationary and contractual obligations impacting the base budget.
- Alignment to the goals and objectives of the City's Long-Term Financial Plan and Financial Condition Assessment.
- The general outlook for the city including growth projections.
- Infrastructure funding (renewal and new) aligned with the Asset Management Funding Plan and the Multi-Year Community Investment Plan.
- Financial commitments resulting from recent Council decisions and previously approved capital projects.

- Forecasted investments required to sustain city operations, manage community growth and enhance city services.

Key Findings

Based on the investments in current and expanded service delivery included within this report, the City would require a budget increase of 5.80%. Assuming a Region of Halton increase of 4.3% and no change for Education, the overall tax increase is forecasted to be 4.40% equivalent to $42.71 per $100,000 of residential current value assessment (CVA). Burlington's portion of the overall increase would be 2.98% as outlined below.

Budget Drivers	Overall Share of Tax Bill	2026 Budget Change (thousands)	2026 Budget % Change	2026 Total Tax Increase
Maintaining Service Levels		$ 9,338	2.75%	1.6%
Operating Impacts of New Infrastructure		$ 1,611	0.60%	0.3%
Operational and Financial Sustainability		$ 100	0.04%	0.0%
Provision to Infrastructure		$ 5,537	2.08%	0.9%
Total Base Budget		**$ 16,586**	**5.47%**	**2.83%**
Sustaining City Operations, Financial Oversight and Risk Mitigation		$ 207	0.08%	0.04%
Enhancing Services		$ 673	0.25%	0.11%
Total City of Burlington	**52.1%**	**$ 17,466**	**5.80%**	**2.98%**
Region of Halton	32.9%		4.30%	1.41%
Education	15.1%		0.00%	0.00%
Total			**4.40%**	**4.40%**

The Multi-Year Simulation forecasts increases for 2027 – 2030 as follows:

	2027	2028	2029	2030
City Budget Increase	**5.77%**	**5.61%**	**5.20%**	**5.10%**
City Share of Overall Impact	**3.00%**	**2.96%**	**2.78%**	**2.77%**
Overall Tax Bill Impact (Region @ 3.0%)	**3.99%**	**3.95%**	**3.77%**	**3.75%**
Overall Tax Bill Impact (Region @ 4.0%)	**4.32%**	**4.11%**	**3.89%**	**3.87%**

The 2026 Financial Forecast serves as a comprehensive reference document to support the Mayor and Members of Council in preparing, reviewing, and ultimately approving the City's final budget. Decisions made as part of the 2026 budget deliberations must be considered within the context of the City's multi-year financial planning framework. This approach is essential to avoid deferring known financial impacts to future years and to ensure a sustainable fiscal strategy.

Key considerations include the operational and financial implications of deferrals, the use of one-time revenues, and potential adjustments to service levels required to achieve the targeted 2026 tax levy. Each of these elements must be evaluated to maintain fiscal responsibility while meeting the expectations of the community.

The budget process remains a critical tool for allocating limited resources to address the City's prioritized opportunities and strategic business objectives. Through this process, the City ensures that residents continue to benefit from the high-quality programs and services that contribute to Burlington's exceptional quality of life.

The investments outlined in the 2026 Financial Forecast will enable the City to:

- Sustain and enhance essential services for a growing community,
- Improve service delivery, and
- Secure funding for both current and future infrastructure requirements.

This report also outlines the methodology that will guide the development and finalization of the 2026 Budget.

As in previous years, the process will include:

- Rigorous internal review and prioritization by City staff,
- Multiple opportunities for public engagement and feedback, and
- A formal opportunity for Council to bring forward motions to amend the Proposed Budget.

The 2026 Budget will continue to reflect the City's core principles of **Affordability, Livability, Sustainability, and Transparency**, ensuring responsible stewardship of public resources and alignment with community values.

Additionally, the budget will provide a clear linkage to the Corporate Strategy demonstrating accountability between what is achieved and the value to taxpayers.

Based on the draft schedule outlined in this report, the 2026 Budget is anticipated to be finalized in late November 2025. Budget approval in advance of the new year allows for the early tendering of capital projects which can result in favourable pricing and construction timelines.

Purpose of report:

This report provides Council with an overview of the known and estimated financial pressures impacting the City. It outlines the costs to maintain current service levels and recommends investments in key service areas to achieve Council's strategic goals.

This report provides an overview of the Multi-Year Simulation (5 years) including the major budget drivers and expected future tax rate impacts, attached as Appendix A and detailed throughout this report.

Inherent in the annual operating budget process are the pressures of inflation, growth, fluctuating revenues, as well as infrastructure costs.

Alignment to 4 Key Budget Principles

Similar to last year, the 2026 Budget will be aligned to the following 4 key budget principles

1. **Affordability** – Balance providing for today while preparing for our future.
2. **Livability -** Making sure the quality of life for the residents of Burlington is upheld and the services you depend on are enhanced, especially as we continue to grow by over forty per cent in the next 25 years.
3. **Sustainability** – Our budget must provide for present needs while preparing for our future.
4. **Transparency** – A simpler, easier to track and understand presentation of the budget, to foster better community engagement.

Alignment to Corporate Strategy

As outlined in Report TRN-01-25 Burlington's Strategic Planning Approach, the City is undergoing an internal strategic realignment. This includes a revised 25-year Strategic Plan as well as a shift from the service-based Vision to Focus to a department-based 5-year Corporate Strategy.

This Corporate Strategy includes:

- Strategic Directions for the organization.
  These are the high-level, overarching priorities to achieve the vision and mission:
    - Deliver Positive Community Impact
    - Build Transparency and Public Trust
    - Unlock Innovation and Partnerships
    - Enable Sustainable Growth

- Objectives that Help Deliver the Goals.
  The objectives bridge the gap between the high-level priorities and operational execution. These objectives are grouped in four balanced scorecard perspectives:

  1. Customer, Community, and Partners
     - Strengthen community resilience and environmental sustainability
     - Foster collaboration with external partners
     - Ensure services and decisions reflect community priorities
  2. Financial Stewardship
     - Drive financial sustainability
     - Optimize resource planning and utilization
  3. Internal Processes (Enablement & Operations)
     - Streamline operational and decision-making processes
     - Improve governance and accountability
     - Leverage technology for efficiency and enhanced customer experience
     - Build a foundation for operational excellence and future growth
  4. Our People
     - Strengthen leadership and staff relationships
     - Cultivate a high-performing leadership team
     - Develop a future-thinking and stable workplace culture

- Strategic Performance Indicators that provide quantifiable insights into how effective the organization is executing and delivering the 5-year corporate strategy.

Linking the Corporate Strategy to the budget provides accountability between what is achieved and the value to taxpayers. This process provides a clear link between the strategy and the investment required to implement the initiatives.

The budget is one mechanism that implements the Corporate Strategy through specific project initiatives.

Key findings:

Multi-year Simulation

The Multi-year Simulation (attached as Appendix A) provides a 5-year forecast of future tax increases. The simulation provides an analysis of what the future financial picture for the City of Burlington may look like, helps assess financial risks and the affordability of existing services and capital investments, and provides an opportunity to analyze sensitivities to assumptions.

When developing the 5-year budget simulation model, staff considered many factors including:

- Known inflationary and contractual obligations impacting the base budget.
- Alignment to the goals and objectives of the City's Long-Term Financial Plan and Financial Condition Assessment.

- The general outlook for the city including growth projections.
- Infrastructure funding aligned with the Asset Management Funding Plan and Multi-Year Community Investment Plan.
- Financial commitments resulting from recent Council decisions and previously approved capital projects.
- Forecasted investments required to sustain city operations, manage community growth, and enhance city services.

Details of the multi-year simulation can be found in Appendix A.

Implications:

2026 Financial Needs Summary

Municipalities are required by provincial law to balance their annual budget such that revenues match the expenditures for the current year.

The net tax levy is the amount of property taxes required to support city services after consideration of user fees and other corporate revenues. To support the items included within the 2026 Financial Forecast the City would require a net tax levy of $282,190,340.

2026 Overall Tax Impact

Based on the investments in current and expanded service delivery included within this report, the City would require a budget increase of 5.80%.

The forecast assumes a 0% increase for the Boards of Education.

At the time of writing, the 2026 estimated increase for the Region of Halton is not yet known. The Region's 2025 Budget (Regional report FN-34-24) included a forecasted increase of 3% excluding police services and 4.3% including police services.

Should the Region of Halton's increase be 3% the overall tax increase is forecasted to be 3.97% equivalent to $38.55 per $100,000 of residential current value assessment (CVA).

Should the Region of Halton's increase be 4.3% the overall tax increase is forecasted to be 4.40% equivalent to $42.71 per $100,000 of residential current value assessment (CVA).

Under each scenario Burlington's portion of the overall increase would be 2.98%.

The impact on property taxes is detailed in the table below:

Budget Drivers	Overall Share of Tax Bill	2026 Budget Change (thousands)	2026 Budget % Change	2026 Total Tax Increase
Maintaining Service Levels		$ 9,338	2.75%	1.6%
Operating Impacts of New Infrastructure		$ 1,611	0.60%	0.3%
Operational and Financial Sustainability		$ 100	0.04%	0.0%
Provision to Infrastructure		$ 5,537	2.08%	0.9%
Total Base Budget		**$ 16,586**	**5.47%**	**2.83%**
Sustaining City Operations, Financial Oversight and Risk Mitigation		$ 207	0.08%	0.04%
Enhancing Services		$ 673	0.25%	0.11%
Total City of Burlington	**52.1%**	**$ 17,466**	**5.80%**	**2.98%**
Region of Halton	32.9%		4.30%	1.41%
Education	15.1%		0.00%	0.00%
Total			**4.40%**	**4.40%**

It is important to note that Burlington remains below the group average of surrounding GTHA municipalities when comparing the tax burdens of similar properties per the 2024 BMA annual study.

Multi-Year Simulation

The Multi-Year Simulation forecasts increases as follows (detailed in Appendix A):

	2027	2028	2029	2030
City Budget Increase	**5.77%**	**5.61%**	**5.20%**	**5.10%**
City Share of Overall Impact	**3.00%**	**2.96%**	**2.78%**	**2.77%**
Overall Tax Bill Impact (Region @ 3.0%)	**3.99%**	**3.95%**	**3.77%**	**3.75%**
Overall Tax Bill Impact (Region @ 4.0%)	**4.32%**	**4.11%**	**3.89%**	**3.87%**

Key Dates & Milestones

A summary of key dates for public engagement and the budget review process can be found in Appendix B.

References

The forecast presented in this report adheres to the principles that have been recognized by Council as important policy decisions including those outlined in the following reports:

FIN-10-25: 2026 Budget Process
PWS-30-25: 2025 Corporate Asset Management Plan
F-24-24: Multi-year Community Investment Plan – Financing Plan Update Report
CM-12-23: Vision to Focus (V2F) The City of Burlington's 4-Year Workplan
F-19-23: 2023 Financial Condition Assessment
F-22-12: The City of Burlington Long Term Financial Plan

Strategic Alignment

☑ Driving organizational performance

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Appendices:

A. Multi-Year Simulation
B. Key dates for public engagement and budget review

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Multi-Year Budget Simulation - 2026-2030 Budget Pressures

Items have been numbered to assist with referencing the financial table.

Maintaining Current Service Levels – Base Budget

1. Inflationary Pressures and User Fees

Economic Pressures
Labour shortages, new regulations, and tariff risks continue to influence the cost environment in complex ways.

Consumer Price Index (CPI)

- CPI rose 1.7% year-over-year in May, matching April's increase.
- Main drivers: smaller rent increases and declines in travel tours; slight rebound in gas and cellular service prices.
- Excluding energy, CPI rose 2.7% in May (down from 2.9% in April).
- Gasoline prices dropped 15.5% year-over-year, largely due to the removal of the consumer carbon levy.

Construction Price Index

- Construction costs are rising sharply across Canadian municipalities in 2025.
- In the Toronto area, the non-residential construction index rose 3.8% in Q1 year-over-year.
- Key drivers: increased utility and metal fabrication costs, labour shortages, and U.S. tariffs on imported materials.
- These pressures are significantly raising capital project costs for the City.

GDP Growth

- Canadian GDP grew 2.6% in Q4 2024.
- Slower growth of 1.8% is forecast for 2025, with trade tensions expected to dampen investment and exports.

Other Operating Expenses & Revenues

- A 1.75% base funding increase is planned for Local Boards and Partnered Corporations in 2026 (Burlington Public Library, Burlington Museums, Art Gallery of Burlington, The Burlington Performing Arts Centre (BPAC), and Burlington Economic Development and Tourism).
- Most user rates and fees are projected to rise by 3.0% annually, depending on market conditions.

Efficiencies

As part of the annual budget development process, members of the City's Executive Leadership Team (XLT) identify efficiencies and establish clear priorities to find savings, avoid unnecessary costs, and make the most of available resources. This involves systematically reviewing operations, programs, and expenditures to pinpoint areas where processes can be streamlined, resources better allocated, or duplicative efforts reduced. At the same time, prioritization ensures that limited funds are directed toward the highest-impact initiatives—those that align most closely with the City's strategy and organizational goals and deliver the greatest value to the community. By combining efficiency improvements with strategic prioritization, the City can strengthen financial stewardship, support critical services, and position itself for long-term sustainability without compromising core outcomes.

2. Corporate Expenditures/Revenues

Provisions to Reserve Funds

Reserves and reserve funds when used in conjunction with debt policies are a critical component of a municipality's long-term financial plan and financial health, as highlighted in the BMA Management Consulting Inc. (BMA) financial condition assessment (Report F-19-23, May 2023).

Reserves and reserve funds provide tax rate and cash flow stability when the City is faced with unforeseen or uncontrollable events. It ensures cash flows are sustained and allows

for internal financing for temporary or one-time expenditures. Furthermore, these funds provide the City flexibility to manage debt levels and allows for planning future liabilities.

BMA placed the following indicators in a Caution status:

- Stabilization Reserve Funds are below target policy levels.

  The target balance for the consolidated stabilization reserve funds (excluding Building Permit Stabilization Reserve Fund) is set at 10%-15% of the city's own source revenues. As of March 31, 2025, the consolidated balance of these reserve funds is below target at 7.1%.

- Capital Reserve Funds are also below target policy levels.

  A consolidated target for capital reserve funds should be a minimum balance of 2% of the total asset replacement value. Based on the city's updated 2025 total asset replacement value of $7.15 billion, this equates to $143 million. As of March 31, 2025, the City's uncommitted consolidated year-end balance in capital reserve funds is approximately $23.0 million, well below the intended target.

- Corporate Reserves and Reserve Funds require a sufficient budget allocation.

  These reserves and reserve funds are used to manage costs that will be transferred to future generations, as the City incurs liabilities that do not have to be paid immediately. Reserves and reserve funds in this category include Employee Accident (self-insured WSIB), Benefits and Insurance costs. Contributions to these reserve funds should take into consideration the liability associated with these funds. A sufficient budget allocation is required to fund in-year WSIB costs and post-employment benefits so that the Employee Accident Reserve Fund and Benefits Reserve Fund can eventually be replenished to cover the future liabilities.

The Finance Department is currently undertaking a comprehensive review of the City's reserve funds to ensure they are appropriately structured, adequately funded, and aligned with the City's financial policies and long-term goals. This review includes evaluating the purpose, usage, and target balances of each reserve to confirm they meet current and future needs—such as funding capital projects, managing risk, and responding to unforeseen events. By analyzing reserve levels and usage trends, the department aims to improve transparency, support financial stability, and ensure that reserve funds continue to serve as a strong foundation for responsible fiscal management. The results of this review will be presented to Council this fall.

Debt/ Debt Charges

The Multi-Year Forecast reflects *Responsible Debt Management* as the budget adheres to the city's debt policy limits while using debt in the most effective manner as per the

city’s long-term financial plan. The city’s debt policy limits the total debt charges as a percentage of net revenues to 12.5% (provincial legislated limit is 25%). As of March 2025, the City’s total debt charges as a percentage of own source revenue is estimated to be 8.56%.

The city’s debt policy contains an allowance to temporarily exceed the 12.5% to a maximum of 15% for no more than three (3) consecutive years. The corresponding recovery from the overage should also be sustained for a minimum of three years. The city’s current debt limit is within the parameters as defined by the policy.

Staff continue to monitor the interest rate environment and regularly review debt modelling to adjust for current and forecasted impacts of interest rate changes. Increased interest rates reduce available debt capacity and result in higher debt financing costs to the City. The budget for tax supported debt charges will need to be increased to reflect the increase in financing costs associated with forecasted debenture issuances related to the city’s capital program. As the interest rate market is changing, estimated impacts are based on projected rates at time of issuance and are subject to change.

The “Impacts of New Infrastructure” section of the simulation includes increases in tax supported debt charges of $300,000 in 2026 to accommodate the remaining required debt to be issued for the first phase of the Robert Bateman Community Centre project. An additional $750,000 in each of 2027 and 2028 has been included to support phase 2 of this project.

Corporate Revenues

The Bank of Canada (BoC) has continued its monetary easing during Q1 of 2025, reducing the overnight rate to 2.75% in March 2025. This marks a cumulative 2.25% reduction since June 2024, when the rate stood at 5.00%. The BoC attributed its decision to ongoing economic uncertainty and the impact of U.S. tariffs on Canadian exports.

In this evolving environment, the BoC has emphasized that future interest rate decisions will be guided by ongoing assessments of inflation trends, economic growth, and global trade dynamics. While further rate reductions are anticipated, the timing and extent will depend on economic conditions.

Despite these challenges, the recent period of elevated interest rates has allowed City staff to secure strong yields on long-term bond investments, locking in attractive rates before the broader market decline. However, reinvestment risk remains a key consideration, as maturing positions and new funds may need to be allocated at lower interest rates going forward.

Staff continue to manage the City’s investment portfolio prudently, aligning investment decisions with both economic conditions and the City's Investment Policy objectives. The

strategy remains focused on preserving capital, generating stable income, and ensuring sufficient liquidity to meet operational needs. Staff will monitor economic and financial developments closely and adjust as necessary to support the long-term financial health of the City.

The forecast includes:

- An additional resource to provide enhanced financial oversight and support to actively manage the City's investments, financial risk and maximize investment returns. The cost of this new resource is anticipated to be offset with additional investment returns.
- A further increase in investment income of $50,000 per year starting in 2027.

3. Assessment Growth

An important consideration in the preparation of the budget is estimating the rate of growth expected in the community which affects both revenues and expenses in the capital and operating budgets.

Growth in the community will result in incremental tax revenues from assessment growth. It also drives the requirement to expand services and infrastructure such as roadways, parkland and facilities to a growing community.

The 2026 forecast includes assessment growth at 0.75%. This provides approximately $1,985,000 of additional revenue to offset inflation and growth-related costs in the base budget. The assessment growth of 0.75% reflects increased assessment from new construction offset by reductions to assessment resulting from appeals based on Assessment Review Board (ARB) decisions and Requests for Reconsideration.

Over the past 5 years, net assessment growth has ranged from a high of 1.02% to a low of 0.34% for an average of 0.66%. Assessment growth is forecasted at 0.75% for 2026 increasing to 1.00% from 2027 – 2030.

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
	Actual					Forecast				
Net Assessment Growth	0.34%	0.45%	0.60%	1.02%	0.89%	0.75%	1.00%	1.00%	1.00%	1.00%
Average	0.66%					0.95%				

These estimates are based on an analysis of future development projections including an allowance for assessment appeals. This growth can be difficult to forecast as it is

dependent upon new properties being added to the assessment roll by the Municipal Property Assessment Corporation (MPAC).

Finance staff will work closely with MPAC and should assessment growth assumptions change they will be incorporated in the 2026 Proposed Budget and adjusted in future updates to the simulation.

4. Operating Impacts of New Infrastructure

Additional investments in new and enhanced community assets have been approved which will result in additional operating expenses. These items will impact the 2026 and future budgets and include:

- Increased software maintenance costs as well as ongoing resourcing to operationalize Information Technology capital projects which support Building a 21st Century Workforce (2026-2030)
- Expansion of Transit Service – the phasing in over 2026 and 2027 of operating expenses for four conventional and one specialized bus purchased in the 2025 budget. This aligns to the objectives of the Transit 5-year business plan.
- Additional tax supported debt charges as outlined earlier in the Debt/ Debt Charges section of this report (2026-2028) related to the Bateman Community Centre (phases 1 and 2).
- Additional maintenance costs associated with the formal assumption of the Alton West community.
- Various other operating impacts from a variety of smaller capital projects

5. Operational and Financial Sustainability

Council has endorsed a multi-year approach to provide $100,000 of continued incremental investment in recreational facility preventative maintenance. This investment is included in the 2026 forecast and 2027 of the simulation.

6. Provision to Infrastructure

2025 Corporate Asset Management Plan (PWS-30-25)

The 2025 Corporate Asset Management Plan is included on this same agenda. This report provides a strategic framework for managing Burlington's infrastructure to ensure safe, reliable, and cost-effective service delivery for current and future residents. This report recommends that the dedicated infrastructure renewal levy of 2.0% be maintained in the 2026 budget.

During 2026, the City will complete a Long-Term Financial Plan to holistically review and consolidate all funding requirements across the corporation with all financial resources, including debt financing capacities. The results of this plan will inform any future adjustments which may be required to the infrastructure levy after 2026.

Multi-Year Community Investment Plan (F-24-24)

The Multi-Year Community Investment Plan (MYCIP) which outlined a financing plan for proposed multi-year community investment opportunities. The MYCIP identified capital infrastructure requirements related to master plans completed to date such as the Parks Provisioning Master Plan, Integrated Mobility Plan, Fire Master Plan as well as land requirements and future facility needed to support some of these infrastructure developments and the development of complete communities over the next 25 years.

Based on the forecasted timing capital investments requiring this funding, the annual incremental increase to the base funding can be reduced to $250,000 for 2026. This value is increased to $750,000 for 2027 and $1 million for 2028-2030.

7. Key Investments

Key Investments are proposed variations in the budgeted expenditures or revenues for which separate budget disclosure is warranted. These priorities identified in the simulation are classified within two categories.

A. Sustaining City Operations, Financial Oversight and Risk Mitigation

The simulation includes several initiatives that serve to bring City operations and asset maintenance to recommended service levels, improve operational and financial oversight and reduce risk. For 2026 these include:

- Improved investments in Forestry Service to close current service level gaps in accordance with the Urban Forestry Master Plan recommendations.
- Additional Planning resource resulting from the City's new accountabilities under Bill 185 which removed planning responsibilities from Halton Region. This resource would support natural heritage matters during development review.
- Enhanced financial oversight and support to actively manage the City's investments, financial risk and maximize investment returns.
- Additional Transit mechanic resource to support repairs and preventative maintenance activities on the expanded transit fleet. This will mitigate the risk of service disruptions and improve customer experience.
- Enhanced support to mitigate the risk of the on-going threat of cyber security attacks.

- Enhanced funding to the Burlington Public Library to support additional costs related to the New Appleby Branch and stabilize operational expenses.

B. Enhancing Services

The simulation includes several items to enhance current service levels. For 2026, these items include:

- Additional waste management services within parks. This creates a positive customer experience and promotes the use of our outdoor recreational amenities.
- The conversion of staffing resources in the Roads, Parks and Forestry services to enhance drainage operations.
- Service level improvements to the Windrow Removal Program.
- Additional funding to support public engagement opportunities.

The city continues to make investments in our capital program which will enhance our ability to provide needed services within our community. Some examples in 2026 include:

- Continued phased funding to support an expansion of the Transit Operations Centre to facilitate the growth of the Transit program that has occurred over the past number of years and is forecasted to continue in the future.
- Investment in new Active Transportation facilities, aligned with our Integrated Mobility Plan.
- Continued investment in the revitalization of our aging recreation facilities to enhance customer experience, improve accessibility and address new infrastructure requirements.

8. Allowance for Unknown Factors

As with all forecasts, it is imperative to recognize that there are unknown factors that will likely occur in the future that could impact the model. To address these unpredictable factors, an amount of $100,000 has been included in the 2027 forecast, increasing by $100,000 per year. This allowance has been included to recognize that factors in the simulation such as future efficiency savings and assessment growth can be increasingly difficult to predict the further out into the future they are.

Multi-Year Budget Simulation ($ Thousands)

Appendix A of Report FIN-24-25

	Description	Forecast 2026	2027	2028	2029	2030
	City Tax Levy	**$ 264,724**	**$ 282,190**	**$ 301,456**	**$ 321,549**	**$ 341,639**
1 & 2	**Maintaining Service Levels (Base Budget)**	**$ 9,338**	**$ 9,071**	**$ 9,431**	**$ 9,806**	**$ 10,197**
3	**% Assessment Growth**	**0.75%**	**1.00%**	**1.00%**	**1.00%**	**1.00%**
4	**Operating Impacts of New Infrastructure**					
	Software Maintenance Costs and Enhancements to Systems	$ 482	$ 295	$ 319	$ 342	$ 348
	New Asset Maintenance from the Capital Program	$ -	$ 150	$ 194	$ 180	$ 180
	Operating impact of Community Growth	$ 276	$ 560	$ 560	$ 560	$ 747
	Bateman Operating Costs and Debt Charges	$ 300	$ 750	$ 1,023	$ 273	$ -
	Expansion of Transit Service	$ 554	$ 554	$ -	$ -	$ -
5	**Operational and Financial Sustainability**					
	Maintaining Recreational Assets (Preventative Maintenance)	$ 100	$ 100	$ -	$ -	$ -
6	**Provision to Infrastructure**					
	Infrastructure Renewal Levy	$ 5,287	$ 5,644	$ 6,029	$ 6,431	$ 6,833
	Multiyear Community Investment Plan Funding	$ 250	$ 750	$ 1,000	$ 1,000	$ 1,000
	Additional Base Budget Items	**$ 7,249**	**$ 9,363**	**$ 9,685**	**$ 9,346**	**$ 9,854**
	Key Investments					
7a	Sustaining City Operations, Financial Oversight and Risk Mitigation	$ 207	$ 389	$ 485	$ 246	$ 175
7b	Enhancing Services	$ 673	$ 342	$ 292	$ 393	$ 401
	Total Key Investments	**$ 880**	**$ 731**	**$ 777**	**$ 638**	**$ 576**
8	**Allowance for Unknown Factors**		**$ 100**	**$ 200**	**$ 300**	**$ 400**
	Total Net Taxes	**$ 282,190**	**$ 301,456**	**$ 321,549**	**$ 341,639**	**$ 362,666**
	City Budget Increase (%)	**5.80%**	**5.77%**	**5.61%**	**5.20%**	**5.10%**
	City Share of Overall Property Tax Increase (%)	**2.98%**	**3.00%**	**2.96%**	**2.78%**	**2.77%**
	Overall Property Tax Increase (including Region and Education) (%)	**3.97%**	**3.99%**	**3.95%**	**3.77%**	**3.75%**
	Regional tax increase estimated at 3.0% in 2026 - 2030					
	Overall Property Tax Increase (including Region and Education) (%)	**4.40%**	**4.32%**	**4.11%**	**3.89%**	**3.87%**
	Regional tax increase estimated at 4.3% in 2026, 4.0% in 2027, 3.5% in 2028 and 3.4% thereafter					

Budget Townhalls and Feedback Opportunities (Draft Dates)

- The City will continue to utilize its existing online engagement tools, including survey opportunities available through GetInvolvedBurlington.ca.
- The budget will be prominently featured at the City's annual *Food for Feedback* event in September, and a Telephone Town Hall is scheduled to take place in November.
- Budget Town Halls will be held in each of the City's six wards, providing residents with an opportunity to engage directly with their elected representatives.
- The Open Book platform will be used to present the budget in a transparent, interactive, and user-friendly format, enabling the public to explore budget data in greater detail.
- To support public engagement, a draft budget summary will be made available on the City's website, with printed copies provided in advance of the Budget Ward Meetings, which are scheduled to begin on September 18, 2025.

Location	Ward	Time	Date
Food for Feedback (Central Park)			September 13, 2025
Haber Community Centre (Community Room 1)	6	7:00-8:30 pm	September 18, 2025
LaSalle Pavilion (Main Ballroom)	1	7:00-8:30 pm	September 22, 2025
Burlington Senior Centre (Community Room 3)	2	7:00-8:30 pm	September 23, 2025
Brant Hills Community Centre (Community Room 1)	3	7:00-8:30 pm	September 24, 2025
Tansley Woods Community Centre (Community Room 1)	4	7:00-8:30 pm	September 29, 2025
Appleby Ice Centre (Community Room 1)	5	7:00-8:30 pm	October 2, 2025
Telephone Townhall		7:00-8:30 pm	November 5, 2025

Council Budget Review Process

Similar to last year, Members of Council who wish to bring forward amendments to the proposed budget are requested to complete a Budget Review Form, which will be distributed electronically to all Council members.

Staff kindly ask that these forms be used to identify any proposed changes to the capital and operating budgets.

A consolidated summary of all submitted Budget Review Forms will be used to structure the agenda for the Budget Committee meetings, commencing on November 24th.

A summary of the Council budget review process is outlined below:

Draft Review Dates

Item	Meeting	Date
2026 Financial Forecast	Committee of the Whole	July 7, 2025
Release of Proposed Budget (agenda available October 24)	Committee of the Whole	November 3, 2025
Divisional Budget Presentations by XLT	Budget Committee	November 13, 2025
Committee review of Proposed Budget, amendments proposed via Budget Review Form process	Budget Committee	November 24 and 25, 2025
Council review of Proposed Budget	Special Council Meeting	December 2, 2025

Note:
Per legislation, there is a 30-day period for Council to review and amend the Proposed Budget once it has been released. This period can be shortened via a Council vote. Following Council review of the Proposed Budget there is a 10-day period in which the Mayor can veto a budget amendment. This period can be shortened via a Mayoral Decision. If the veto power were exercised, there is a 15-day period in which a 2/3rds majority of Council can override the veto. After process of amendments, vetos and overrides has passed the budget is deemed to have been adopted.

Motion Memorandum

To: Committee of the Whole

From: Mayor Marianne Meed Ward

Date to Committee: July 7, 2025

Date to Council: July 15, 2025

CIP date: N/A

Motion for Council to Consider:

Endorse the attached Mayoral Decisions on the 2026 budget, directing staff to prepare a budget and eliminating the veto period.

Reason:

Under the *Municipal Act*, 2001 ("Municipal Act") the Mayor, as head of Council, is required to prepare a budget to Council for consideration. In past years, the Mayor has issued a Mayoral Decision directing staff to prepare the budget. The attached Mayoral Decision in Appendix A is in service to that legislated requirement, directing staff to prepare the 2026 budget for public and Council review.

Further, provincial legislation provides that the Mayor can veto Council budget amendments within 10 days of the passing of a budget, and Council may override that veto by a two-thirds majority vote. The Mayor has the ability to issue a Mayoral Decision ending the veto period on the day Council votes on amendments, and has done so each budget year since the Municipal Act was amended to require heads of Council to prepare budgets. By electing not to exercise the veto, and ending the veto period following council voting on any amendments, the budget is deemed approved. The attached Mayoral Decision in Appendix B confirms that there is no intention of exercising veto power, ending the veto period on the day Council votes on the final budget amendments, effectively passing the final budget. This Mayoral Decision will be issued after Council budget deliberations are concluded.

To ensure maximum Council participation in the budget process, the Mayor is seeking Council endorsement of this Mayoral Decision and welcomes any amendments to both Mayoral Decisions in advance of issuing them.

Outcome Sought:

To enhance community and Council collaboration while adhering to provincial legislation outlining budget responsibilities assigned to Heads of Council.

Bringing the Mayoral Decision on the budget to Council for endorsement provides Council the full ability to modify the 2026 budget directions by majority vote while adhering to the provincial legislation. This follows the same process as last year, where the Mayor sought and received Council endorsement on the Mayoral Decision related to the 2025 budget.

Bringing this Mayoral Decision through Council prior to issuance provides opportunity for community input, and gives Council the opportunity they have historically had to set budget directions and influence the formation of the budget. After Council deliberations, the Mayor will modify the Mayoral Decision based on any amendments that achieve majority support.

The Municipal Act provides Mayors with veto power over budget amendments made by Council. The Mayor's veto can be overridden by a two-thirds majority vote of Council. The Mayor has not and will not use this veto power, and each year has issued an additional Mayoral Decision expressing intent to not exercise a veto, shortening the veto period (10 days under provincial legislation) to zero, to coincide with Council's final day of budget deliberations and amendments. That Mayoral Decision will have the effect of the budget being "deemed approved" following Council's final votes on the amendments.

By not exercising a veto, this in effect upholds the ability that Council has historically had to shape the budget, with input from community members, by bringing and voting on amendments, leading to a collaborative approach to budget formation.

Regarding budget process and timelines, Council has previously voted in favour of the timeline associated with the 2026 Community Budget, identified in report: [insert]

Staff have also prepared reports on budget pressures and multiyear forecast, which they provide council each year for review. That report is on this committee's agenda for Council's consideration, and will help to inform Council's deliberations on the budget directions.

All of these efforts ensure Council is fully involved in the preparation and vote on the budget.

Implications:

That Council provides the resources to staff to deliver services the community depend on for quality of life.

Strategic Alignment

☑ Designing and delivering complete communities
☑ Providing the best services and experiences
☑ Protecting and improving the natural environment and taking action on climate change
☑ Driving organizational performance

Approved as per form by the City Clerk

Proposed Mayoral Decision re: Direction to the Chief Financial Officer (CFO) pertaining to the 2026 Budget

Mayoral Decision

In accordance with subsection 284.3 and 284.16 of the Municipal Act, 2001 (the “Act”), I, Marianne Meed Ward, Mayor of Burlington, hereby directs the Chief Financial Officer (CFO) to:

1) With direction from the Mayor and in consultation with the CAO, and Deputy Mayor of Strategy and Budgets, prepare a summary of the draft 2026 Budget for Council and public consultation and input;
2) Prepare the 2026 Budget, considering feedback from the community, members of Council in both their Council and Deputy Mayor roles, input from the Deputy Mayor of Strategy and Budgets, the needs identified in the 2026 financial needs and multi-year forecast (Financial Forecast) and direction from the Mayor; and
3) Ensure any proposed changes to budget (increases or decreases) are done in accordance with the overall objective of inflation plus infrastructure, with a target tax of 3.5% inclusive of Region, with the City portion of the total tax rate less than 3%, while adhering to the following four principles that balance providing for today while preparing for our future:
    a. **Affordability**
    b. **Livability**
    c. **Sustainability**
    d. **Transparency**

This direction takes effect following Council's vote July 15, 2025 and remains in effect until modified or revoked.

Proposed Mayoral Decision re: Notice to shorten the 10-day period for the Mayor to veto an amendment resolution passed by Council to the proposed budget

Mayoral Decision

Under Bill 3, the Strong Mayors, Building Homes Act, 2022, which amended the Municipal Act, 2001 (the Act) I Marianne Meed Ward, Mayor of the City of Burlington, hereby decide that, with respect to the 2026 Budget:

1) I will not exercise the power to veto under subsection 284.16(4) of the *Municipal Act, 2001*; and
2) This Mayoral Decision provides written notice under subsection 284.16(4) of the Municipal Act, 2001, and subsection 7(7) of O. Reg. 530/22 to shorten the 10-day period to veto an amendment resolution passed by City Council to the proposed budget, to the date of council's final deliberations and vote on amendments to the budget.

Recommendation Report Summary

SUBJECT: Electric Vehicle Charging Policy and fee options

TO: Committee of the Whole

FROM: Public Works

Transportation

Report Number: PWS-02-25

Wards Affected: All

Date to Committee: July 7, 2025

Date to Council: July 15, 2025

Recommendation

Approve Option 2 included in public works report PWS-02-25 to implement a $2.00/hour fee for city owned Level 2 electric vehicle chargers for the first four hours of charging, increasing to $5.00/hour for subsequent charging time, and a fee of $10.00/hour for city owned Level 3 (fast) electric vehicle chargers; and

Report back by Q4 2025 with the necessary amendments to the Rates and Fees By-law as well as the Parking and Idling By-law for approval by City Council to implement the fees at a future date; and

Approve the EV chargers on city property corporate policy attached as Appendix A to public works report PWS-02-25.

Executive Summary

Purpose of report:

- To recommend a fee structure be implemented for the City's publicly available electric vehicle (EV) chargers and establish a corporate policy for electric vehicle charging.

Key findings:

- Since adopting its 2014 Community Energy Plan, Burlington has significantly expanded EV charging infrastructure through public and private investment, supporting its goal of becoming a net carbon neutral community by 2050.

- Staff found most Ontario municipalities charge $1–$3/hour for Level 2 EV charging, some increase rates after initial hours, and a few offer free charging with parking fees.
- To help manage the increasing inventory of City owned EV charging stations, staff have developed an Electric Vehicle Charging Policy to provide guidance on the operation, maintenance, monitoring and reporting of the chargers.

Implications:

- The City is facing rising costs for maintenance, repairs, and electricity as its electric vehicle charging infrastructure expands and utilization increases.

Background

In 2014, City Council approved a Community Energy Plan for Burlington that included an action to support electric mobility: Monitor the electric vehicle market and investigate the feasibility of electric vehicle charging stations at City facilities, including downtown parking lots. Supporting electric mobility was further strengthened in the 2020 Climate Action Plan where it was identified as a key program area to help achieve the target to be a net carbon neutral community by 2050.

Since the approval of the Community Energy Plan, the City, institutions and private businesses have actively invested in charging infrastructure to help support the adoption of electric vehicles in Burlington as summarized here:

- In 2015, two charging stations (four charging heads) were installed for public use in the City's parking garage.
- In 2018, the City was successful in obtaining funding from the provincial Workplace EV Charging Inventive Program for 10 charging stations (20 charging heads) in downtown parking lots and the Roads, Parks and Forestry Operations Centre (restricted to staff use during weekday working hours).
- In 2022, funding was approved by The Atmospheric Fund to support eight charging stations (16 charging heads) for community centre facilities.
- Also in 2022, Natural Resources Canada reconsidered a previously denied application, approving funding for 11 charging stations (22 charging heads) plus two Level 3 charging heads, the only Level 3 chargers in our inventory.
- The City now has 46 charging stations (88 charging heads) in operation on municipal property with 38 charging stations being available to the public either 24 hours per day or on evenings and weekends, depending on the parking lot.
- Four additional charging stations (eight charging heads) will be installed in 2025.
- From 2021 to 2024, City owned charging stations saw an increase in electrical utilization (kilowatt hours) by nearly 400%. In the same period the number of unique vehicles plugged into the City's chargers increased by 250% to 4,230.
- Institutions and private sector entities have also installed publicly available EV chargers. From 2022 to 2025, the total number of publicly available charging stations in Burlington, including City owned chargers, increased by 46%, from 114 to 166.

Industry Scan

Staff reviewed online data for municipal charging fees in 18 municipalities located in southwestern/central Ontario.

- Twelve municipalities (67%) charge an hourly charging fee, ranging from $1.00 - $3.00 per hour (for Level 2 chargers). Seven out of 12 (58%) charge in the range of $1.50 - $2.00 per hour.
- Five municipalities out of 18 have implemented a secondary charge, meaning a higher hourly rate is applied following a certain number of hours of either free or a lower hourly rate.
- Four municipalities offer free charging (but parking fees apply where applicable).

Operational and Lifecycle Costs

The cost of ownership of the City EV charging infrastructure has increased since the inception of the program. The annual cost is approximately $80,000 to operate, which covers electricity, licensing fees (cloud plan), maintenance/repairs and replacements. This does not include staff time required to operate and maintain the stations.

The current asset value of the City's charging infrastructure is estimated at $1,300,000. The cost of installing a new Level 2 charging station is budgeted at $25,000. The costs for a Level 3 charging station are higher at $50,000, although this could vary depending on the capacity of the Level 3 charger. The costs to repair stations range from $1,000 to $7,000 depending on the severity of the repair.

In 2022, the responsibility to install, operate, maintain and monitor the charging stations was consolidated under the Energy and Emissions staff team. As the EV charging inventory continues to grow, so has the time required to manage the inventory under the existing staff complement.

Downtown Economic Development

One of the impacts of offering free charging at the City's EV charging stations that is highlighted in the City's charging data is the disincentive to move a vehicle even after it's fully charged. Data from the City's downtown charging stations indicates that vehicles are left plugged in beyond the four-hour maximum time. There is a four-hour limit for charging in the Parking Bylaw but given the level of construction activity in the downtown as well as overall officer capacity, this is currently enforced on a complaint basis.

The City is currently undertaking the Downtown Parking Study. The study will highlight that increasing vehicle turnover is correlated with increasing patronage to downtown businesses and optimizing vehicle turnover will be a recommended objective of any future changes to the Parking and Idling Bylaw. Introducing an EV charging fee is anticipated to improve availability at the City's EV chargers by motivating drivers to move their vehicle and avoid unnecessary fees.

Achieving Climate Action Objectives

City Council has supported free EV charging at City owned chargers to incentivize EV ownership in Burlington, to help reduce emissions and work towards the target to be a net carbon neutral community by 2050. Staff have been tracking EV ownership data published by the Ministry of Transportation. Since 2019, ownership of battery electric vehicles (full electric) in Burlington has increased by almost 500%. Local EV test drive events with Plug'n Drive have also helped to promote the benefits of electric mobility.

Public Feedback/Opinion

Sustainability staff have been engaging the public to prioritize action areas for the new updated Climate Action Plan to be presented to City Council in Q3 2025. Support for City owned EV charging stations is low compared to other areas such as walking/cycling, transit, the Better Homes Burlington concierge service and sustainable new buildings. Providing free charging is seen to serve a small part of the population who can afford electric vehicles and, therefore, is not seen to be equitable.

To help manage the increasing inventory of City owned EV charging stations, staff have developed an EV Chargers on City Property corporate policy (refer to Appendix A) to provide guidance on the operation, maintenance, monitoring and reporting of the chargers. In addition, as reported in the 2023 report on Electric Mobility (EICS-16-23), staff have been assessing options to implement charging fees for the City's charging stations to help recover costs.

Analysis

EV Charging Fee Options

Three fee options are presented for consideration for City owned EV charging stations. As noted, several municipalities, institutions and businesses have begun to implement a staged charging model by charging a higher hourly rate after a four-hour period to motivate drivers to move their vehicles, generate parking turnover and improve availability of charging stations. Staff have incorporated this approach into Options 2 and 3.

Option 1 – Business as Usual – Continue to offer free charging at City owned chargers.

There is no change to the operation of City owned EV charging stations where no fees will be introduced.

Benefits: EV owners continue to enjoy free charging at destinations with City owned chargers.

Considerations: The City is currently not recovering any of the costs of owning and operating the EV charging network. Costs are continuing to grow annually. Free charging is

resulting in less parking turnover in downtown EV charging stalls. Free charging at City chargers may discourage nearby businesses to install charging stations for the public. There is a sentiment among some residents that providing ‘free’ EV charging is not equitable for those who drive traditional vehicles.

Option 2 – Charge an hourly fee for the City’s charging stations.

Introduce an hourly charging rate at City owned EV charging stations. The proposed rate for Level 2 chargers is $2.00/hour for the first four hours and $5.00/hour thereafter. The proposed rate for Level 3 chargers is $10.00/hour.

Benefits: The revenue collected is projected to partially cover the cost of electricity required to charge vehicles. The supplementary higher rate after four hours of charging is meant to incentivize drivers to move their vehicles after charging. The private sector may also be more inclined to install charging stations on private property as they will no longer be competing with free charging.

Considerations: Introducing a fee may be unpopular with some EV drivers who have become accustomed to free charging. A communication campaign will be required to provide EV drivers adequate notice. The City‘s EV chargers are capable of warning drivers of the increasing charge rate after four hours via email and/or text. In addition, a portion of the EV charging fee (10%) will be paid to ChargePoint to cover their administrative costs.

Option 3 – Free charging for the first four hours for Level 2 EV charging stations

Maintain free charging for the first four hours at City owned Level 2 EV charging stations. Introduce an hourly charging rate of $5.00 after the fourth hour. Note: this option is not recommended for the Level 3 EV chargers due to their higher operating and replacement costs.

Benefits: This option provides an interim fee structure to transition the public to Option 2 in the future.

Considerations: Charging an hourly fee after the first four hours will help incentivize drivers to move their vehicles after charging, improving parking turnover and increasing the availability of chargers. This option provides some cost recovery for the City for EV charging operations.

Recommendation Details

Approve Option 2 included in the Electric Vehicle Charging Policy and Fee Options report PWS-02-05 to implement a $2.00/hour fee for City owned Level 2 electric vehicle chargers for the first four hours of charging, increasing to $5.00/hour for subsequent charging time;

Approve a fee of $10.00/hour for City owned Level 3 (fast) electric vehicle chargers;
Report back with the necessary amendments to the Rates and Fees bylaw as well as the Parking and Idling bylaw for approval by City Council to implement the fees at a future date; and

Approve the EV Chargers on City Property corporate policy attached as Appendix A to the Electric Vehicle Charging Policy and Fee Options report PWS-02-05.

Key Dates & Milestones

Pending approval of the recommended option:

- Report to amend the Rates and Fees bylaw as well as the Parking and Idling Bylaw: September 2025
- Communications campaign to advise EV charging rates: September 2025
- Implementation date for introduction of hourly charging fee pending approval: October 2025
- Update report one year after implementation: October 2026

Implications

- Staff will monitor the rates of usage of the EV charging stations and cost recovery from charging fees and report back in a year from the date of implementation to recommend any necessary changes.
- A communications plan will be developed and implemented to engage the community and EV drivers on the new fees, in advance of being introduced.
- It is estimated that just over 500 tonnes of greenhouse gas emissions have been saved through the utilization of the City's EV charging stations.

References

- EICS-08-23 Electric Mobility Update
- Climate Action Plan

Strategic Alignment

☐ Designing and delivering complete communities

☐ Providing the best services and experiences

☑ Protecting and improving the natural environment and taking action on climate change
☐ Driving organizational performance

Author:

Tom Pedlar
Supervisor, Energy & Emissions

Appendices:

A. EV Chargers on City Property corporate policy

Draft By-laws for Approval at Council:

- Report to amend the Rates and Fees bylaw as well as the Parking and Idling Bylaw: September 2025.
- Implementation date for introduction of hourly charging fee pending approval: October 2025.

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Corporate Policy

Appendix A to PWS-02-25

Transportation

EV Chargers on City Property

Approved by Council on: July 15, 2025

Report Number: PWS-02-25

Effective: July 15, 2025

Reviewed on: July 15, 2025

Amended: N/A

Next Review: July 2026

This corporate policy applies to the future planning, installation, operation, usage, and maintenance of electric vehicle (EV) charging stations on City property.

Policy Statement:

The City supports electric mobility through the installation and operation of EV charging stations on City property to support a transition away from the use of fossil fuels in the transportation sector, including City fleet vehicles.

Scope:

The policy applies to:

- Planning for future installation of EV charging stations on City property
- The installation, operation and maintenance of EV charging stations on City property
- Public usage of City owned EV charging stations
- Staff usage of City owned EV charging stations for personal vehicles (during work hours)
- The implementation of fees and fines for the operation of the EV charging stations
- Barrier free design for the installation of EV charging stations

Corporate Policy

Objectives:

To work towards the City's climate targets for City operations to be net carbon zero by 2040 and a net carbon neutral community by 2050 by:

- Operating and maintaining a fleet of EV charging stations on City property
- Monitoring and reporting on usage and demand for the City's EV charging stations
- Incentivizing EV charging through free charging time or a nominal/hourly fee, which will be assessed on a regular basis
- Implementing measures to ensure EVs do not stay longer than permitted, such as fees and fines
- Engaging staff and the public on the benefits of electric mobility

Definitions:

For the purpose of this policy, unless otherwise stated, the following definitions shall apply:

Term	Definition
Electric Mobility	Refers to vehicles and other e-micro mobility options that use electricity (from an external charging source) to fuel the movement of the vehicle either in whole or in part. Specifically, this means plug-in hybrid electric vehicles (PHEV) and battery electric vehicles (BEV).
Battery Electric Vehicle (BEV)	Runs on an electric motor powered by electricity from an external electric source. The vehicle must be plugged into an outlet or charging station to charge.
Plug-in Hybrid Electric Vehicle (PHEV)	Runs on an electric motor powered by electricity from an external electric source, in addition to support from an internal combustion engine. The vehicle battery can be recharged by plugging into an outlet or charging station as well as through a gas-powered alternator and/or by regenerative braking.
Level 1 Charger	Uses a standard 120V household outlet to full charge in 8 – 20 hours. One hour of charging provides approximately 8 km of driving range and is the slowest speed of charging.

Term	Definition
Level 2 Charger	Uses a 240V outlet or connection, similar to that of a dryer or stove to fully charge in 4 – 6 hours. One hour of charging provides approximately 30 km of driving range and is the most common charger installed in homes and public charging locations.
Level 3 Charger	Also known as 'DC Fast Charger' and provides 80% charge in under an hour for most EVs. Typically using over 480V DC. One hour of charging provides approximately 300 km of driving range and is typically installed along highways and public charging locations.

Principles:

The following principles will help guide operations, maintenance, monitoring and reporting, as well as planning for future expansion of EV charging stations on City property.

- Encourage electric vehicles through the provision of EV charging stations on City property.
- Disincentivize blocking of EV charging stations through fees and/or fines.
- Implement barrier free designs for new EV charging stations where space allows.
- Reduce downtime by proactive monitoring and repairs.
- Areas to expand EV charging stations on City property will be identified by monitoring usage/demand of existing stations to determine gaps and must also consider available power and infrastructure accessibility to reduce costs; as well as available staff resources to support additional EV charging stations.
- Planning and operations of EV charging stations to meet the needs of the Corporate Fleet will fall under the Corporate Fleet Policy.
- City staff will utilize the publicly available charging stations on City property for fleet vehicles.
- City owned fleet vehicles will not be charged for time at City owned EV chargers.

References:

Burlington Electric Mobility Strategy
Burlington Green Fleet Strategy
Corporate Energy and Emissions Management Plan
Climate Action Plan

Roles:

Accountable:

Commissioner, Public Works

Responsible:

Supervisor, Energy and Emissions

Recommendation Report Summary

SUBJECT: Bromley Road area minor reconstruction – additional storm sewer works (Contract ES-24-11)

TO: Committee of the Whole

FROM: Public Works

Engineering Services

Report Number: PWS-31-25

Wards Affected: 5

Date to Committee: July 7, 2025

Date to Council: July 15, 2025

Recommendation

Approve additional storm sewer replacement scope for Bromley Road area minor reconstruction (RD-RR-1635) project, including additional funding in the amount of $900,000 from Infrastructure Renewal Reserve Fund, increasing the total project budget to $18,225,254 (net HST).

Executive Summary

Construction of the Bromley Road Area Minor Reconstruction (RD-RR-1635) project commenced in November 2024 (see Project Area map in Appendix A). Construction phase inspections have identified deterioration in the existing storm sewers since the pre-design condition review, and replacement of an additional 660 metres of pipe, including appurtenances, is now considered warranted to ensure long-term structural integrity and groundwater impermeability of the stormwater system. The contractor is prepared to complete this work, which is anticipated to extend the project schedule by up to eight weeks – anticipated construction completion is now November 2026.

Staff recommend the approval of the additional storm sewer replacement scope and a corresponding budget increase of $900,000 for the Bromley Road Area Minor Reconstruction (RD-RR-1634) project, with funding to be sourced from positive variance allocations to the Infrastructure Renewal Reserve Fund detailed in report 2025 Capital Variance and Project Closure (FIN-19-25) report.

Purpose of report

Request approval for an additional $900,000 in funding from the Infrastructure Renewal Reserve Fund for additional storm sewer works on the Bromley Road Area Minor Reconstruction (RD-RR-1635) project in accordance with Schedule D, Section 11 of the Delegated Authority By-law 71-2023 (as amended).

Key findings:

During routine on-site inspections of the storm infrastructure conducted as part of the wastewater and watermain construction for the project, and confirmed through closed-circuit television (CCTV) review, it was determined that the condition of the storm sewers within the project area has deteriorated significantly since the pre-design assessment completed in 2018. The sewers now show increased susceptibility to groundwater infiltration, reduced structural integrity, and may not be capable of meeting service requirements until the next scheduled road renewal in the area.

Implications:

Replacing the deteriorated storm sewers as part of an existing contract maximizes cost efficiency, minimizes future maintenance issues, and ensures long-term stormwater infrastructure reliability without the need for additional contractor mobilization. The additional storm sewer scope is anticipated to extend the project completion date up to eight weeks.

Background

The Bromley Road Area Minor Reconstruction (RD-RR-1635) project includes full depth asphalt replacement, replacement of existing concrete curb and sidewalk, installation of new sidewalks, street lighting upgrades and spot repair of concrete storm sewers within the project area limits (Appendix A, Project Area). Construction services were procured as a joint tender with Halton Region in July 2024, including water and wastewater scope within the project area. The contract was awarded to D'Orazio Infrastructure Group Limited through Procurement Award Report ES-24-11 and construction commenced in November 2024.

During standard on-site inspections of the storm infrastructure conducted during construction of the wastewater main and watermain for the project, and confirmed by closed-circuit television review, it was determined that the condition of project area storm sewers has deteriorated since the pre-design condition review completed in 2018. These sewers are more susceptible to groundwater infiltration, have reduced structural integrity and may not meet service requirements until the next scheduled road renewal (asphalt resurfacing) for the project area.

As a result, spot storm sewer repairs are no longer considered sufficient and approximately 660 metres of additional storm sewers, including appurtenances, warrant replacement. The increase in construction cost is estimated to be $900,000 based on recent competitive bids for stormwater infrastructure, including this contract.

Analysis

Considerations:

As part of the assessment of the deteriorated storm sewers within the project area, both Cured-in-Place Pipe (CIPP) rehabilitation and full storm sewer replacement were evaluated as potential solutions.

Full replacement of the storm sewer has been advanced as the preferred solution due to construction risks associated with the CIPP solution due to the extent of deterioration in the existing pipes. Furthermore, replacement of the sewers provides a longer asset life, ensuring subsequent repairs will not be required before the next scheduled road renewal (asphalt resurfacing).

Benefits:

- Mitigates localized flooding potential by reducing groundwater infiltration, thereby maximizing available storm sewer capacity.
- Eliminates the risk of costly emergency storm repairs that would occur outside the timing of the next scheduled road renewal (asphalt resurfacing) project.
- Takes advantage of competitively bid 2024 storm sewer unit prices, providing better value for investment.

Recommendation Details

The recommendation is to add additional funding in the amount of $900,000 from positive variance allocations to the Infrastructure Renewal Reserve Fund (Report FIN-19-25) to the Bromley Road Area Minor Reconstruction (RD-RR-1635) project and proceed with replacing approximately 660 metres of deteriorated storm sewer under Contract ES-24-11.

Key Dates & Milestones

- Tender Award – July 2, 2024
- Construction Start – November 29, 2024
- Anticipated Commencement of Storm Sewer Scope – Summer 2025
- Anticipated Construction Completion – Fall 2026

Implications

- The approved budget for Bromley Road Area – Minor Reconstruction (RD-RR-1635) project is $17,325,254. An additional $900,000 is required to complete the additional storm sewer scope. The estimated total revised project budget is $18,225,254.
- The additional budget will be funded from the Infrastructure Renewal Reserve Fund. The uncommitted balance in this reserve fund as of March 31, 2025, is approximately $8.2 million. This balance is prior to the funding allocation as part of the 2025 Capital Variance and Project Closure (FIN-19-25) and the recommended draw from this report.
- In accordance with Schedule D, Section 11 of the Delegated Authority By-law 71-2023, the funding required post tender is greater than $100,000 and requires Council approval.

References

- 2025 Capital Variance and Project Closure, FIN-19-25
- Delegated Authority By-law 71-2023, as amended
- Procurement - Award Report ES-24-11, June 26, 2024

Strategic Alignment

- ☐ Designing and delivering complete communities
- ☐ Providing the best services and experiences
- ☑ Protecting and improving the natural environment and taking action on climate change
- ☐ Driving organizational performance

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Appendices:

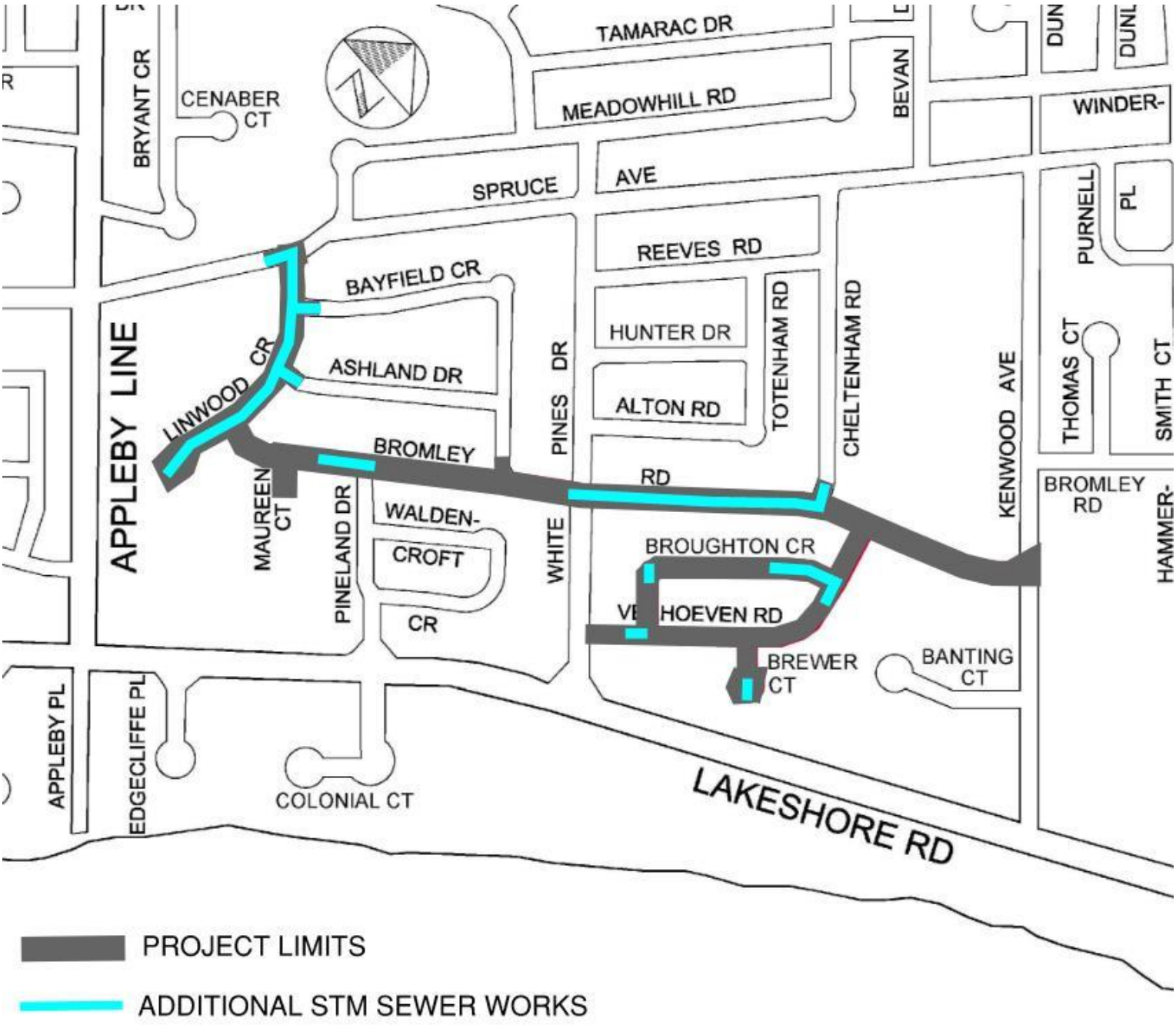
A. Project Area Map

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

APPENDIX A

Project Area Map



Recommendation Report Summary

SUBJECT: 2025 Corporate Asset Management Plan
TO: Committee of the Whole
FROM: Public Works
Engineering Services
Report Number: PWS-30-25
Wards Affected: All
Date to Committee: July 7, 2025
Date to Council: July 15, 2025

Recommendation

Approve the City's 2025 Asset Management Plan, attached to public works report PWS-30-25 as Appendix 'A', and

Endorse the approved asset levels of service strategy, as outlined in the 2025 Asset Management Plan; and

Direct the Chief Financial Officer to incorporate the financial requirements identified in the 2025 Asset Management Plan - specifically the recommended 10-year capital investment scenario - into the planned 2027 future Long-Term Financial Plan update, to ensure alignment between asset levels of service and long-range fiscal planning; and

Direct the Director of Engineering Services to publish the 2025 Asset Management Plan on the City's website to ensure transparency and public accessibility, and to notify the Ontario Ministry of Infrastructure in accordance with the requirements of Ontario Regulation 588/17 under the Infrastructure for Jobs and Prosperity Act.

Executive Summary

Purpose of report:

This report seeks Council approval of the 2025 Asset Management Plan, including target levels of service for City infrastructure, aligned with Ontario Regulation 588/17 under the

Infrastructure for Jobs and Prosperity Act. The plan supports evidence-based infrastructure planning, long-term sustainability, and effective delivery of city services.

The 2025 Asset Management Plan (AMP) provides a strategic framework for managing Burlington's infrastructure to ensure safe, reliable, and cost-effective service delivery for current and future residents. Developed in accordance with Ontario Regulation 588/17, the AMP outlines the condition, replacement value, and lifecycle strategies for all city-owned assets, and includes current and proposed future levels of service and a long-term financial plan to support sustainable investment. Aligned with the City's Strategic Plan and Corporate Strategy, the AMP strengthens decision-making, supports regulatory compliance, and informs the capital budget to maintain and enhance the quality of life in Burlington.

The AMP satisfies the final phase of Ontario Regulation 588/17, building on the 2021 AMP and the 2023 AMP state of infrastructure and financial plan update, which met previous legislative requirements.

The AMP provides a summary of:

- The current state of the City's infrastructure
- Current and proposed service levels
- Lifecycle and risk management strategies; and
- Strategies for future asset investment and financing

The AMP is a strategic tool that provides insight into the current state of infrastructure, provides a forecast for future capital needs, and supports informed decisions that balance asset performance, cost, and risk.

Over the next 10 years, a $350M gap is forecasted between state of good repair (SOGR) lifecycle needs and planned funding.

The AMP highlights a long-term infrastructure funding gap and provides financial strategies and opportunities to address this through planned reinvestment, improved asset lifecycle management, and integration with the city's annual budgeting process and long-range financial planning efforts.

Background

In 2016-17, the City produced its first Asset Management Plan (AMP). The plan was developed based on the Building Together Guide developed by the Provincial government in 2012. The plan was approved by Council in April 2017 (report CW-22-17), and an Asset Management Financing Plan was presented in May 2017 (report F-12-17).

Also in 2016, the Provincial Government passed the *Infrastructure Jobs and Prosperity Act*, which gave the Province the authority to guide municipal asset management planning through regulation. This was followed in late 2017, by the introduction of O.Reg. 588/17 which established the standard content to be included in all Asset Management Plans in the province of Ontario.

In 2019, the City approved its Strategic Asset Management Policy (report CW-30-19) in accordance with O. Reg 588/17, thereby meeting the first requirement of the regulation.

In 2021, the City completed its second AMP in accordance with O. Reg 588/17. The initial phase of the regulation required that the plan only covers core infrastructure, but the City opted to develop a comprehensive plan covering all asset classes that met the requirements up to and including those stated for July 1, 2024. The plan and accompanying financial strategy were approved by Council in November 2021 (report ES-47-21).

In 2023, the City completed an update to the 2021 plan to account for inflationary and other macro-economic impacts that occurred during the pandemic (report F-20-23). This included a state of infrastructure and lifecycle need calculation update, and an update to the previously approved asset management financing strategy. Council's approval of the updated plan continued to demonstrate their commitment to the city's infrastructure needs.

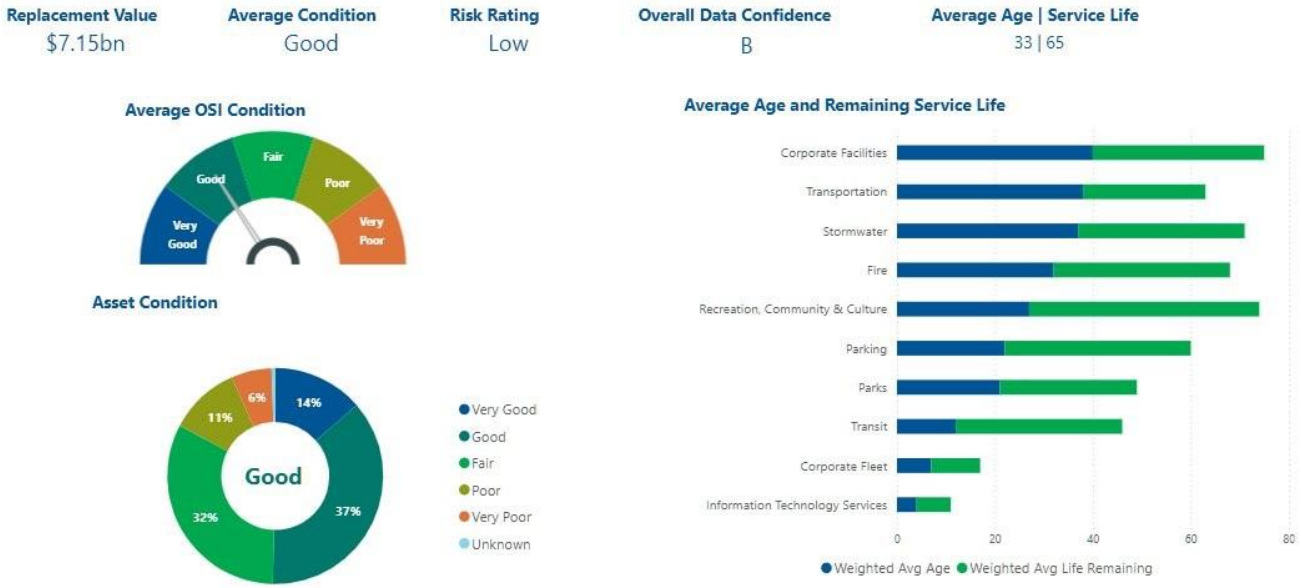
For more than a decade, Council has demonstrated a strong commitment to asset management and sustained investment in infrastructure state of good repair. The introduction of a dedicated infrastructure renewal levy in 2015—which has subsequently increased to the current 2.0%—has strengthened the city's ability to maintain its infrastructure, manage risk proactively, and plan more effectively for future service needs.

Analysis

State of the Infrastructure

The state of infrastructure summarized in the AMP provides a comprehensive overview of the City's infrastructure assets, offering a snapshot of the physical state of Burlington's municipal assets—ranging from transportation and stormwater systems to parks, facilities, and fleet—based on the most current inventory and assessment data. It supports evidence-based decision-making by identifying asset condition trends, lifecycle stages, and reinvestment needs, forming the foundation for risk management, service planning, and long-term financial forecasting. This baseline helps guide prioritization of infrastructure renewal and investment in alignment with service expectations and fiscal sustainability. The current state of the City's asset portfolio is shown in the Figure 1 dashboard.

Figure 1 – Corporate State of Infrastructure Dashboard



Levels of Service Overview

Levels of Service (LOS) are central to the AMP, providing a framework to define and measure the performance, quality, and reliability of municipal services. Burlington's LOS model balances community expectations with operational performance and aligns with provincial standards under O. Reg. 588/17.

LOS Development Approach

Through workshops with asset leads, the city refined its LOS framework using a structured, citywide methodology. Each service area adopted consistent service attributes and indicators:

- Service Attributes: Scope, Quality, Reliability, Safety, Availability, Environmental Sustainability.
- Performance Measures:
  - *Community (Lagging) Indicators*: Reflect outcomes experienced by the public.

- *Technical (Leading) Indicators*: Track internal efforts needed to achieve Community (Lagging) targets.

Three standardized LOS metrics were applied across all asset services:

- Reinvestment Rate – Capital renewal spending as a percentage of replacement value
- SOGR Backlog – Accumulated cost of deferred renewal reinvestment
- % Poor or Very Poor – Share of asset value in substandard condition

These corporate-level metrics provide a consistent benchmark for long-term financial asset planning. In addition to the corporate metrics, each asset service (e.g., transportation, stormwater, corporate fleet) has specific metrics aligned with departmental key performance indicators (KPIs), master plans, and internal reporting needs. These detailed metrics are included in the appendix to the Corporate Asset Management Plan.

Asset Investment and Financing Strategy Development Approach:

The City's Asset Investment & Financing Strategy is grounded in a comprehensive, evidence-based methodology that integrates lifecycle costing, risk analysis, and financial forecasting. The strategy ensures that infrastructure investments are aligned with long-term service level goals, fiscal sustainability, and provincial regulations (notably O. Reg. 588/17).

Key Methodologies Used:

- EAMS-DSS (Predictor) Modeling: The City uses Enterprise Asset Management System (EAMS) – Decision Support System (DSS) software called Predictor to simulate infrastructure lifecycle needs and evaluate reinvestment scenarios based on asset condition, risk, and funding constraints.

- LOS Framework: Three standardized Level of Service (LOS) metrics were selected:
  - Reinvestment Rate
  - State of Good Repair (SOGR) Backlog
  - % of Assets in Poor or Very Poor Condition

- LOS Investment Scenarios: Three funding pathways were analyzed to understand the impacts of varying investment levels on asset LOS:
  - Planned SOGR Investment - represents the current 10-year capital budget
  - Optimized - funding is "unconstrained" and meets all lifecycle needs and full elimination of current asset renewal backlog over 10 years)

- Stabilize LOS - increase current capital funding to maintain assets in their current condition to Year 10

Community Engagement and Communications:

Public engagement was conducted for the AMP to align infrastructure planning with community values. A three-pronged engagement strategy shaped the LOS targets:

- An online survey completed by 184 residents emphasized strong support for sustained or increased investment.
- Focus groups revealed varying priorities and highlighted the challenge of balancing trade-offs.
- City staff workshops emphasized funding stability, modernization, and public safety.

These insights ensured that the AMP reflects community values, staff insights, and corporate objectives.

Analytical Tools & Supporting Strategies:

- Guided trade-off discussions between affordability and service expectations.
- Predictor Model: Provides long-range (60-year) forecasts incorporating asset deterioration, treatment (reinvestment) logic, and funding optimization to maximize asset lifecycle.
- Financial Strategy Benchmarks: Included straight-line reinvestment analysis, and funding gap projections.

Results

Current Baseline

Assessment of the current (Year 1) asset baseline performance:

- Reinvestment Rate: 1.08% - Represents the capital reinvestment as a proportion the total replacement value. The industry standard recommended reinvestment rate for core infrastructure is 2–3%. The city's average asset lifespan is 65 years, and the current reinvestment rate equates to an average replacement cycle of 93 years.
- SOGR Backlog: $454 million (6.36% of total replacement value)
- Asset Condition: 17% of assets are in poor or very poor condition

Scenario Results Summary

Table 1 presents the results of the three LOS Investment Scenarios described above in the LOS Development Approach.

Under the Planned SOGR (Current Budget) scenario, the City maintains the current 2% dedicated infrastructure levy and planned reinvestments over the next 10 years. The result of this strategy is an increase in the capital need backlog from $454M to $515M and an increase in % Poor or Very Poor assets by Year 10. The anticipated impact on levels of service in the years beyond Year 10 will become increasingly significant and apparent to the public. Aging assets will deteriorate beyond their optimal lifecycles, leading to more frequent service disruptions, higher maintenance costs, and increased risk of asset failure. In addition, the cost to recover and restore service levels in the future will likely be substantially higher, placing further strain on the city's financial and operational resources.

The Optimized scenario results in the elimination of the capital need backlog entirely by Year 10 and an improvement in the corporate LOS (i.e. decrease in % Poor or Very Poor). All capital reinvestment lifecycle needs are met in the year they are required. This scenario requires the highest level of investment to achieve.

The Stabilize LOS scenario results in a moderate reduction in the capital need backlog, the stabilization of asset condition, and raises the reinvestment rate towards a more sustainable range by Year 10. Under this scenario, the City continues to make strategic investments in assets that present the highest risk. This is a balanced approach that focuses on maintaining asset condition, prevents further deterioration, reduces the risk of service interruptions, and extends the useful life of city infrastructure.

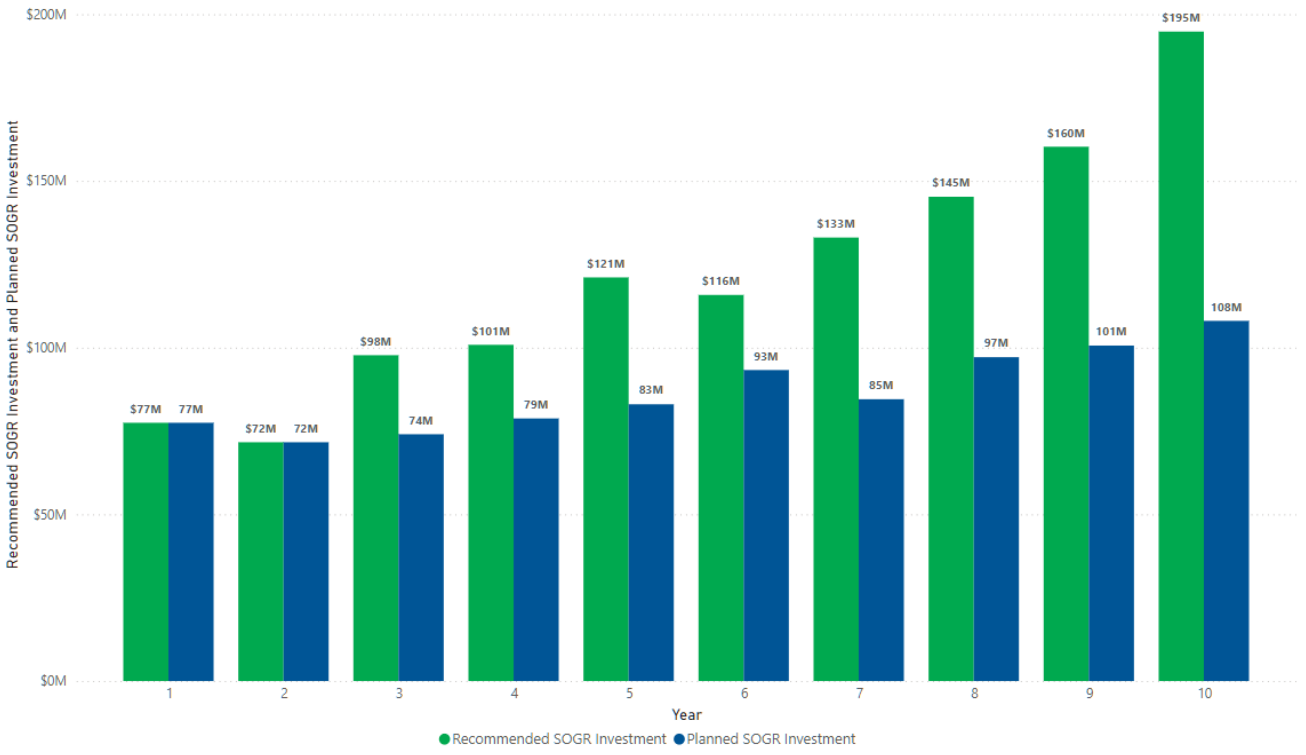
Table 1 – Summary of Levels of Service Investment Scenarios

Scenario	**LOS Metric**	**Year 1**	**Year 10**	**Total 10-year Investment**	**10-year Reinvestment Rate**
Planned SOGR (Current Budget)	Reinvestment Rate	1.08%	1.51%	$868M	1.21%
	Accumulated Backlog	$454M	$515M		
	% Poor or Very Poor	17%	21%		
Recommended SOGR	Reinvestment Rate	1.08%	2.72%	$1.22B	1.70%
	Accumulated Backlog	$454M	$380M		
	% Poor or Very Poor	17%	17%		

Optimized	Reinvestment Rate	1.08%	1.9%	$1.42B	1.99%
	Accumulated Backlog	$454M	$0		
	% Poor or Very Poor	17%	13%		

The graph in Figure 2 illustrates the 10-year forecasted capital investment required under two level of service scenarios: the current (planned) funding scenario and the recommended level of service scenario. The gap between the two illustrates the funding shortfall if the City continues under current asset reinvestment levels.

Figure 2 – 10-YR Planned State of Good Repair and Recommended 'Stabilize' SOGR Scenario



Recommended Scenario: The 'Stabilize LOS' scenario was selected as the preferred path forward, maintaining current service levels while strategically reducing backlog.

Assessment of the future (Year 10) position – based on recommended scenario:

- Reinvestment Rate: 2.72% (within 2–3% recommended range)
- SOGR Backlog: $380 million ($74M reduction)
- Condition: 17% of assets in poor or very poor condition (meeting current LOS)

Strategic Recommendations

- Ramp up investment to maintain existing asset LOS: Progressively increase capital investment over 10 years to reach a 2.72% reinvestment rate and maintain the % of city assets in poor/very poor condition at today's levels which will ensure residents enjoy the same LOS they do in 2025;
- Implement a comprehensive long-term financial strategy: Strengthening asset reserve funds, strategically leveraging debt, and increasing and diversifying funding sources; and
- Optimize asset use and service delivery: Through master plan updates, operational reviews, and efficiency measures—to support long-term infrastructure renewal and fiscal sustainability.

Benefits:

Adopting a strategy to increase capital investment in line with the recommended approach will provide long-term stability, efficiency, and value for municipal infrastructure. It will help stabilize asset condition, maintain reliability and safety of critical services, and reduce the risk of unexpected failures and costly emergency repairs. This approach also supports long-term financial sustainability by enabling timely reinvestment, optimizing asset lifecycles, and aligning spending with strategic priorities and community needs.

Recommendation Details

Burlington's AMP outlines a path to stabilize service levels while addressing a significant funding gap. The recommended 'Stabilize LOS' scenario strikes a balance between affordability and infrastructure sustainability, ensuring the city continues to deliver essential services in compliance with O. Reg. 588/17.

Key Dates & Milestones

Ontario Regulation 588/17 requires that municipalities adopt a comprehensive Asset Management Plan (AMP) covering all assets by July 1, 2025. This plan must include proposed levels of service for the next 10 years, a lifecycle management strategy outlining the activities required to meet those service levels, and a financial strategy to fund those activities.

This milestone marks the final phase of the regulation's rollout and establishes the requirement for municipalities to update their AMP and asset management policy at least every five years, with annual progress reporting to Council.

Implications

Financial Implications:

To support the City's long-term infrastructure needs, the 2025 Asset Management Plan outlines a sustainable and predictable funding approach grounded in financial stability and service delivery. Affordability needs to be balanced with addressing a growing infrastructure backlog, while preparing for annual lifecycle renewal requirements in a fair and sustainable manner. The strategy emphasizes long-term planning, prudent use of financial resources, and regular updates to Council that consider evolving asset needs, service levels, growth, and climate resilience. Council's ongoing commitment is essential to manage risk, reduce reliance on reactive maintenance, and ensure infrastructure remains in a state of good repair for current and future residents.

Adoption of the AMP does not commit Council to specific expenditures but sets in place a framework for prioritizing future investments.

Financial Strategy

As part of O. Reg 588/17, a financing strategy must be included within the AMP that addresses the infrastructure funding gap over time. The current planned budget and forecast will not be sufficient to meet the recommended scenario, and the City recognizes that it will require significant investments to meet the needs in order to stabilize service levels. As such, below are some strategic options for addressing the current shortfall ("gap") over a ten (10) year period by helping offset escalating costs and increase funds:

- Increasing Access to Revenue - through increases to existing revenues, exploring access to new revenues, and leveraging maximum dollars from federal and provincial capital funding.
- Future Adjustments to Levels of Service – review options to maintain or improve existing levels of service, as well as explore where reductions to service levels are possible.
- Apply an Affordability Lens to Policy Development and Strategic Plans - to ensure guiding policies and service-specific master / strategic plans (e.g. Integrated Mobility Plan), outline full lifecycle implementation costs and consider what the City can afford.

- Review Assets in Poor to Very Poor Condition - to ensure critical infrastructure continues to receive adequate funding to address Poor to Very Poor condition assets and mitigate the risk of assets deteriorating to this condition.
- Improve the Alignment Between the Budget Process and Asset Management – ongoing alignments between the asset management program and the budget process will allow for improved decision making related to capital infrastructure requirements and associated operational budget impacts through implementation of short-term and near-term actions.

It is important to keep in mind that the AMP continues to be an iterative process that requires updating with new information and data. The impacts from the corresponding financial strategies employed are continually evaluated against revised infrastructure needs, which will only increase over time as data is refined, potential service standards increase, new assets come online, and new services are introduced.

Funding Opportunities

There continues to be an emphasis on the importance of sustaining and growing the dedicated infrastructure levy, which is a contributor towards a reliable and predictable infrastructure funding plan. It is an important long-term funding tool; however, other revenue options will continue to be explored and maximized. The options available to the city include, but are not limited to, those listed below. Still, it is important to note that some options do not represent ongoing or guaranteed sources of funding.

Revenue Option	Description
Taxation Revenues	• Adjustments to the dedicated Infrastructure Renewal levy, funded from property tax revenue • Consider phased increases to the levy based on the needs as outlined in the AMP
Grants and Government Transfers	• Grants from senior levels of government (e.g. Provincial Gas Tax, Federal Gas Tax and Investing in Canada Infrastructure Program) • Continue to actively pursue federal and provincial infrastructure grants and maintain a grant readiness pipeline
User Fees and Charges	• Increase cost recovery or apply full-cost pricing principles

Debt Financing	• Review existing fees and investigate adding new fees (e.g. Stormwater user fee) • Apply to large capital projects with long useful lives and lifecycle savings and/or intergenerational fairness is evident • Balance with other corporate priorities to maintain Council-approved thresholds

Furthermore, capital reserves and reserve funds are important components of the City's capital financing planning and will continue to be used extensively for the maintenance and renewal of assets. Ensuring they continue to be utilized optimally and appropriately is vital to supporting the service priorities in the AMP.

Long-Term Financial Plan (LTFP)

It is important that the City's financing strategy of the AMP continues to balance service levels with impacts to the City's financial resources. The City will propose in the 2026 budget to complete a LTFP for 2027 to holistically review and consolidate all funding requirements across the corporation with all financial resources, including debt financing capacities. The AMP will be one of many inputs (including the 2024 Development Charges Study, Multiyear Community Investment Plan, Integrated Mobility Plan - to name a few) used to inform the LTFP and will allow the city to determine funding needs and strategies to support the AMP in stabilizing service levels. A comprehensive review of all the City's reserves and reserve funds will also be included to ensure that funding provisions are strategically aligned with priorities across the corporation.

It is recommended that the Infrastructure Renewal Levy is held at 2% until the LTFP is completed, in which staff will be presenting an extensive financing plan that will consider the numerous corporate needs, funds, and implications for growth.

Climate Change Implications:

Asset management must account for climate change by integrating both adaptation and mitigation strategies into planning, operations, and lifecycle costing. This includes assessing how extreme weather events, rising temperatures, and shifting precipitation patterns affect infrastructure performance, service delivery, and risk exposure.

The City aims to embed climate resilience into levels of service and risk management frameworks, prioritize vulnerable assets, and use climate projections to inform long-term investment decisions. By doing so, the City can reduce or mitigate service disruptions, extend asset life, and ensure sustainable service delivery in the face of evolving environmental

conditions.

Growth Implications:
Population and employment growth will put additional pressure on Burlington's existing infrastructure, and O. Reg. 588/17 requires the AMP to account for that demand by identifying related capital and operating costs. The project team reviewed all approved master plans, the 2024 Development Charges Background Study, the Strategic Plan, and the 2025-2034 Multi-Year Community Investment Plan (MYCIP) to compile a growth portfolio estimated at $883 million over the next decade. Projects include road and stormwater upgrades, parks and recreation expansions, transit and fire facilities, and the Bateman adaptive re-use; land purchases are excluded because they are not funded through the Infrastructure Renewal Reserve Fund.

Conservative, "upper range" cost estimates were applied and staggered across the forecast period to smooth annual spending. While these growth projects will increase the City's total asset replacement value, corresponding needs are not yet identified for corporate facilities, parking, IT, or fleet services. The impact of growth to these asset categories will be further quantified as the City continues planning for growth and will inform future iterations of the AMP and other long-range strategic and financial plans, such as the LTFP. Note that the Recommended Scenario in the AMP identifies the investment required to stabilize LOS of the City's existing asset portfolio exclusive of growth and expansion, and the forecasted costs associated with growth within the AMP or in planning documents does not constitute budget proposal nor approval—funding will be confirmed only through future capital-budget decisions.

Strategic Alignment

- ☐ Designing and delivering complete communities
- ☑ Providing the best services and experiences
- ☑ Protecting and improving the natural environment and taking action on climate change
- ☑ Driving organizational performance

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Appendices:

A. 2025 Corporate Asset Management Plan

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.



City of Burlington

Asset Management Plan 2025

Forward and Acknowledgements

The City of Burlington (City) owns and manages a wide range of infrastructure assets across multiple services. This infrastructure is directly linked to the economic, social, and environmental advancement of the community. It is necessary to understand the overall health of the City's infrastructure assets and future requirements so that services can be delivered to our residents, businesses and visitors in a way that minimizes risk, is sustainable, and makes financial sense.

The City's Asset Management Plan (AMP) guides the management of the City's many and diverse assets. It describes the portfolio of assets, how the City manages those assets, how well those actions are working, and how much it will cost to maintain those assets to provide City services. By bringing all this information together, strengths and opportunities in the City's processes can be identified and strategies created to improve tomorrow's outcomes.

This plan has been developed in alignment with best practice frameworks and reflects our organization's commitment to delivering cost-effective and sustainable asset services. It details the state of infrastructure of the municipality's service area's current and proposed Levels of Service and provides asset management and financial strategies designed to facilitate its pursuit of developing an advanced asset management program and mitigate long-term funding gaps.

The development of this Asset Management Plan has been made possible through the contributions and collaboration of various individuals and departments.

The Asset Management team would like to thank the City staff for their continued support, input, and collaboration on this initiative.

In addition to the contributions made by staff, the team also thanks **Dillon Consulting Limited** for their assistance in developing an AMP that meets compliance with requirements set out by O. Reg. 588/17.

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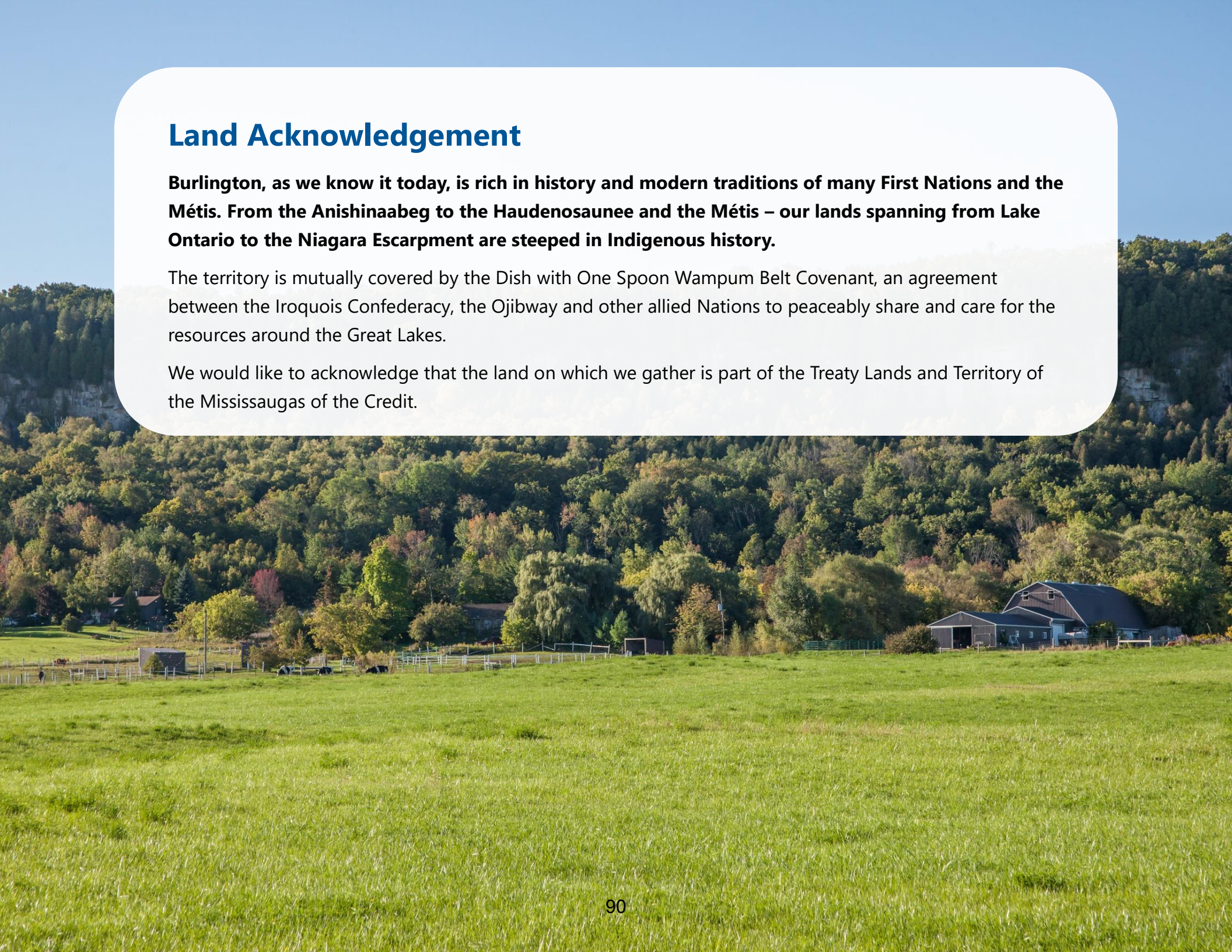
Aaron Brouwers – Director of Engineering Services

Land Acknowledgement

Burlington, as we know it today, is rich in history and modern traditions of many First Nations and the Métis. From the Anishinaabeg to the Haudenosaunee and the Métis – our lands spanning from Lake Ontario to the Niagara Escarpment are steeped in Indigenous history.

The territory is mutually covered by the Dish with One Spoon Wampum Belt Covenant, an agreement between the Iroquois Confederacy, the Ojibway and other allied Nations to peaceably share and care for the resources around the Great Lakes.

We would like to acknowledge that the land on which we gather is part of the Treaty Lands and Territory of the Mississaugas of the Credit.



List of Acronyms

Acronym	Definition
AM	Asset Management
AMP	Asset Management Plan
ASR	Asset Sustainability Ratio
BCI	Bridge Condition Index
BDS	Burlington Digital Services
CapEx	Capital Expenditure
CCA	Canadian Construction Association
CEEMP	Corporate Energy and Emissions Management Plan
CNAM	Canadian Network of Asset Managers
CoF	Consequence of Failure
CRB	Climate Resilient Burlington
CRV	Capital Replacement Value
CRV	Current Replacement Value
CSCE	Canadian Society for Civil Engineering
DC	Development Charges
DSS	Decision Support System
4DX	4 Disciplines of Execution
EAMS	Enterprise Asset Management Solution
ERP	Enterprise Resource Planning
ESL	Estimated Service Life
EVT	Emergency Vehicle Technicians
FAO	Financial Accountability Office of Ontario
FAS	Facilities Assets and Sustainability
FCI	Facility Condition Index
FCM	Federation of Canadian Municipalities

Acronym	Definition
FMP	Fire Master Plan
FUS	Fire Underwriters Survey
GHG	Green House Gas
GIS	Geographic Information System
GTHA	Greater Toronto and Hamilton Area
IMP	Integrated Mobility Plan
IT	Information Technology
KPI	Key Performance Indicator
LoF	Likelihood of Failure
LOS	Levels of Service
LTFP	Long Term Financial Plan
LPP	Live and Play Plan
MMS	Maintenance Management System
MNAI	Municipal Natural Asset Initiative
MTO	Ministry of Transportation
MTSA	Major Transit Station Area
MYCIP	Multi-Year Community Investment Plan
NDT	Non-Destructive Testing
NFPA	National Fire Protection Association
O & M	Operations and Maintenance
O. Reg. 588/17	Ontario Regulation 588/17
OCIF	Ontario Community Infrastructure Fund
OpEx	Operating Expenditure
OSI	Overall Service Index
OSIM	Ontario Structure Inspection Manual
PQI	Pavement Quality Index
PPMP	Parks Provisioning Master Plan
PM	Preventative Maintenance

Acronym	Definition
RCC	Recreation, Community and Culture
RPF	Roads, Parks and Forestry
RPMS	RoadMatrix Pavement Management System
SOGR	State of Good Repair
TBL	Triple Bottom Line
TCA	Tangible Capital Assets
UFMP	Urban Forest Master Plan
VFA	Vanderweil Facility Advisors
XLT	Executive Leadership Team



Executive Summary

E.1 Overview

The 2025 Asset Management Plan (AMP) outlines the City of Burlington's strategy for managing municipal infrastructure to ensure sustainable service delivery, compliance with Ontario Regulation 588/17, and alignment with the City's Vision 2040 Strategic Plan. With infrastructure that supports essential services such as transportation, transit, stormwater management, recreation, facilities, and emergency response, valued at over **$7.1 billion**, the AMP provides a comprehensive framework for maintaining, renewing, and investing in public assets to meet current and future community needs.

The City's infrastructure, supporting services ranging from roads and transit to community centers and stormwater systems, is described as in **Good** condition overall, but facing significant reinvestment pressures and a projected 71,000-person population increase by 2051.

E.2 Strategic Purpose and Legislative Compliance

The AMP is grounded in Burlington's Strategic Asset Management Policy (2019), aligning asset management with corporate strategies such as Vision 2040 and the 2025 Corporate Compass. These strategic documents prioritize financial sustainability, community resilience, and service optimization.

The asset management principles in the AMP include holistic planning, risk-based decision-making, lifecycle costing, and environmental sustainability. The plan also supports critical municipal processes, including long-term financial planning, the capital budgeting process, and the integration of master plans and climate change strategies.

In addition, the AMP:

- Adheres to the City's **Strategic Asset Management Policy**, which prioritizes holistic, risk-based, and sustainable approaches across asset lifecycles;
- Aligns with Ontario's **Infrastructure for Jobs and Prosperity Act** and **O. Reg. 588/17**;
- Meets the July 1, 2025, compliance deadline for Proposed Levels of Service planning; and
- Supports informed long-term financial and operational decisions through integrated data-driven strategies.

Guided by key principles - transparency, sustainability, resilience, and affordability- the AMP formalizes the role of asset management in achieving Burlington's growth, climate adaptation, and infrastructure quality goals.

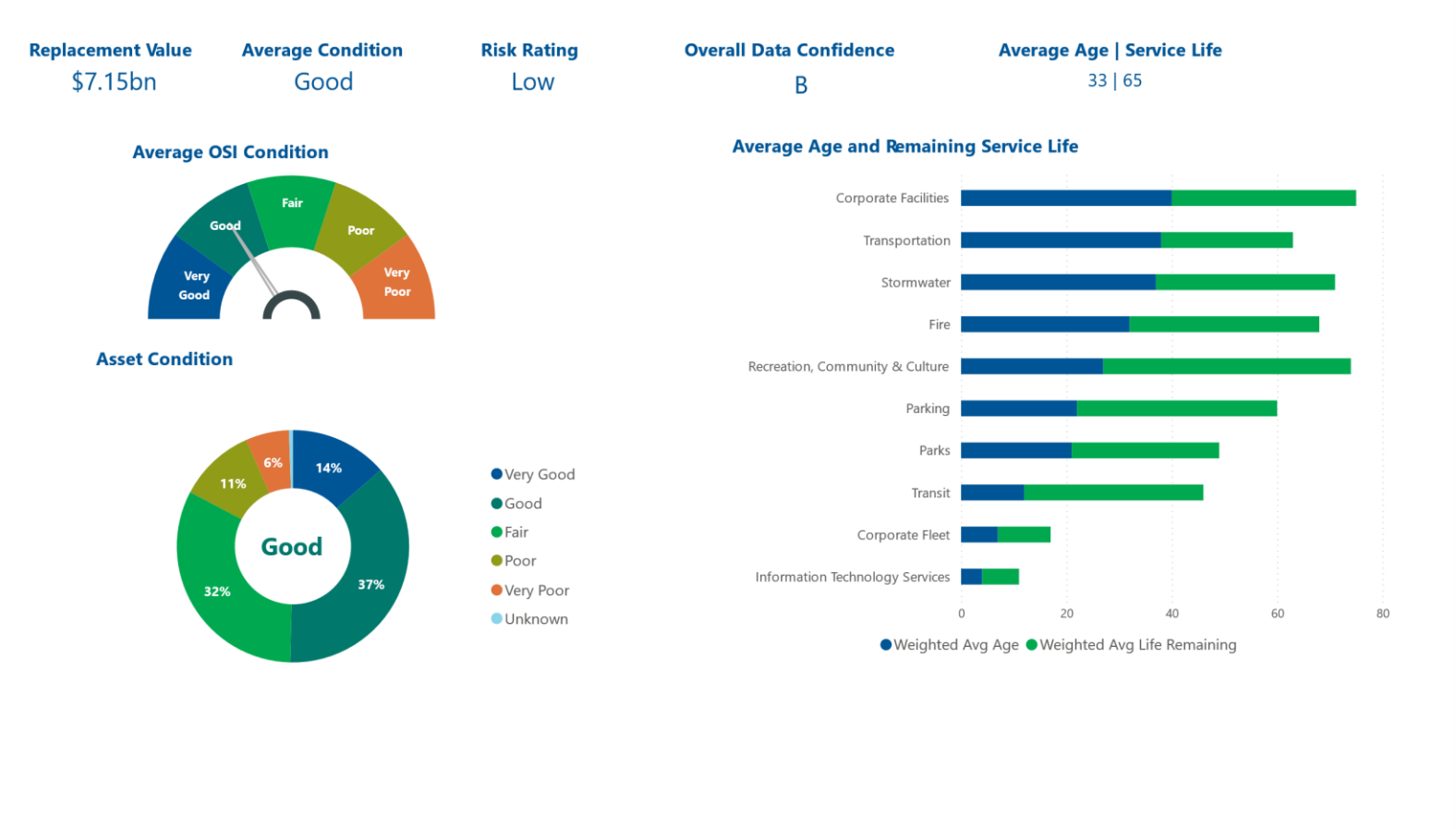
E.3 State of Local Infrastructure

The City manages an asset portfolio comprising **eleven service areas**, including: Transportation; Transit; Stormwater; Fire; Parks; Recreation, Community and Culture; Urban Forestry; Parking; Fleet; Corporate Facilities; and Information Technology. Key findings are presented in **Table E-1** and the overall corporate scorecard in **Figure E-1**.

Table E-1: State of Local Infrastructure - Corporate Highlights

Description	State of Local Infrastructure (2024)
Total Asset Replacement Value	**$7.15 B**
Average Condition	**Good**
Average Asset Age	**33 years**, with an average estimated service life of **65 years**
Overall Data Confidence Rating	**B** (High completeness and accuracy)
Top-valued asset categories (current replacement value)	Transportation: **$2.73 B** Stormwater: **$1.49 B** Recreation, Community and Culture: **$1.15 B**

Figure E-1: State of Local Infrastructure – Overall Corporate Scorecard



Although assets are mostly "mid-life" in terms of age, capital needs will increase as many assets approach end-of-life. The City expects the portfolio to exceed **$9 billion** in value by 2034, driven by inflation and growth - not including new expansion projects.

E.4 Levels of Service (LOS)

In compliance with the regulation, LOS measures were defined using both **Community LOS** and **Technical LOS** indicators across each asset class. The current corporate-wide LOS indicators are presented in **Table E-2**.

Table E-2: Standardized Corporate LOS Metrics - Overall

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate	1.08%
Technical LOS	State of Good Repair (SOGR) Backlog	$454.6 M
Community LOS	% Assets in Poor or Very Poor Condition	17.0%

The City applied the approach of LEAD and LAG indicators, where Technical LOS is the LEAD indicator (where the City has control), and the Community LOS is the LAG indicator (the outcome). These metrics help standardize decision-making, prioritize investments, and communicate service expectations to the community and Council.

E.5 Asset Management Strategies

Lifecycle strategies across the portfolio are based on predictive modelling (via the EAMS-DSS tool), incorporating:

- Non-infrastructure initiatives (e.g., demand management);
- Preventive and corrective maintenance;
- Rehabilitation and renewal; and
- Full replacement and eventual disposal.

Each service area has customized strategies and risk profiles, incorporating climate risk, growth impacts, and long-term affordability. The AMP also aligns with the **Climate Resilient Burlington Plan**, identifying natural assets, flood mitigation, and green infrastructure as future focus areas.

E.6 Public Engagement

To ground LOS targets in community values, the City undertook:

- An **online survey** of 184 residents, provided:
  - Highest satisfaction: **Parks (74%)**; and
  - Priority areas for investment: **Transportation**, **Stormwater**, **Transit.**
- External and internal **focus groups** to explore trade-offs between service expectations and affordability.

Insight from these engagements shaped proposed LOS pathways and future funding strategies.

E.7 Growth and Future Demands

Growth will increase maintenance needs, accelerate wear, and require new service expansions (e.g., new roads, recreation facilities). The AMP forecasts significant pressure on existing assets due to population growth and urban intensification which includes:

- **Population increase:** additional 71,060 by 2051; and
- **Cumulative growth-related asset value: $883 million** (by 2035).

Growth impacts are examined, recognizing that population and employment growth will increase demand on infrastructure and require additional capital and operational funding. The AMP incorporates assumptions from planning documents such as the Official Plan, Development Charges Study, and master plans.

E.8 Financial Strategy and Affordability

The AMP provides a 10-year financial forecast based on lifecycle needs and recommended investment levels. The current financial picture indicates a significant infrastructure funding gap. The AMP assessed multiple investment scenarios using EAMS-DSS to measure asset performance under different reinvestment levels, presented in **Table E-3**.

Table E-3:Reinvestment Scenarios

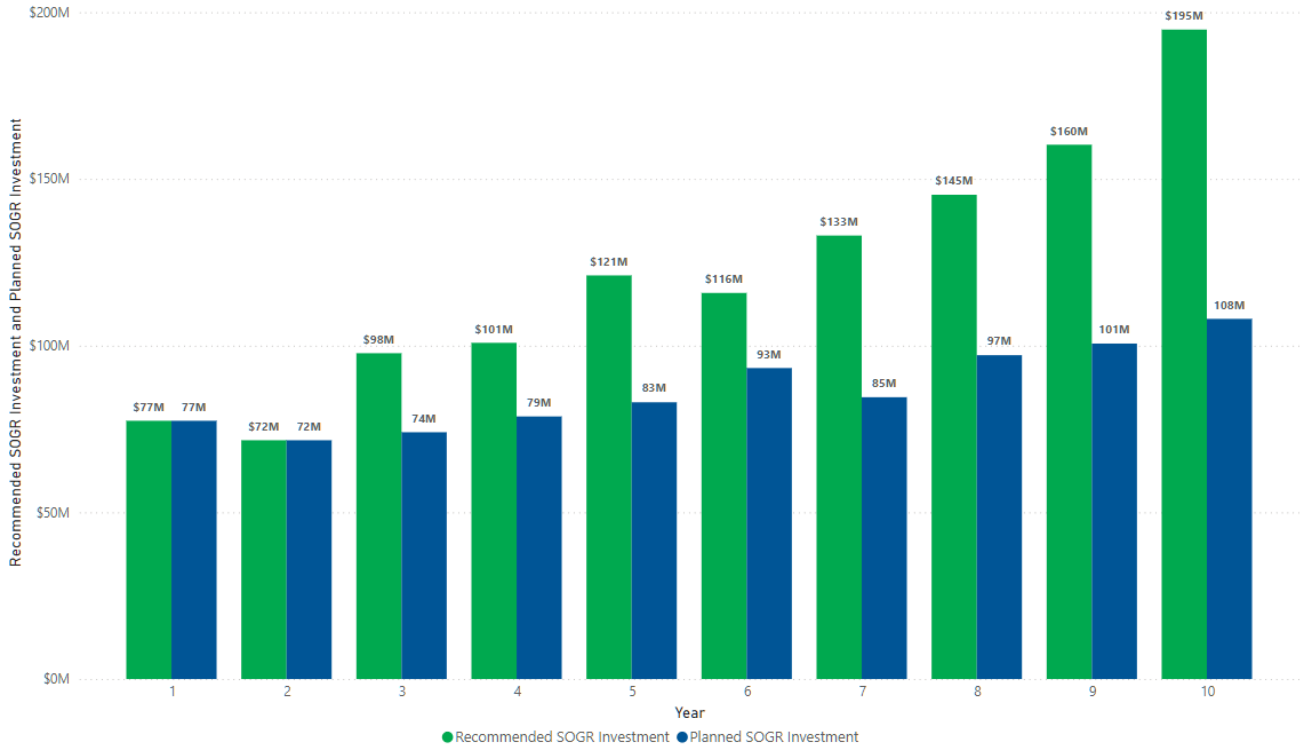
Scenario	10-Year Investment	Reinvestment Rate	Year 10 Condition (% Poor or Very Poor)
Planned SOGR Investment	$868 M	1.22%	21%
Optimized	$1.42 B	1.99%	13%
Stabilize LOS (Recommended)	$1.22 B	1.70%	17%

E.9 Recommended Strategy

The recommended strategy is to Stabilize LOS by ramping up capital spending to 2.72% by Year 10, as presented in **Figure E-2** comparing Recommended SOGR Investment (Stabilize LOS) with the Planned SOGR Investment.

Over the 10-year period, the Recommended SOGR Investment scenario is an additional annual investment of $35 million per year, or $350 million. Strategic funding tools include: Infrastructure Renewal Levy, Development Charges, user fees, reserve funds, provincial/federal grants, and debt (where appropriate).

Figure E-2: 10-Year Forecast (Recommended SOGR Investment compared with Planned SOGR Investment)



The following financial indicators are forecasted for the Recommended SOGR Investment scenario:

- **Total 10-year Investment:** approximately $1.2 billion;
- **Operating Forecast:** approximately $61.8 million annually; and
- **Improved Risk Rating Profile**: a reduction in the percentage of assets in Extreme-, High-, and Moderate-risk, lowering from 50.15% to 44.36% by Year 10, and an increase in the percentage of assets in Low Risk from 49.15% to 55.64% by Year 10.

E.10 Implementation and Continuous Improvement

The City commits to an ongoing plan-do-check-act cycle that includes:

- Annual condition and risk reassessments;
- Evolving lifecycle models as better data becomes available;
- Strategic alignment with capital budgeting and master plans;
- Annual LOS reporting and five-year AMP updates (next: 2028); and
- Continuous integration of climate, housing, and equity goals.

E.11 Conclusion

The 2025 AMP is a critical tool for advancing the City of Burlington's strategic vision and supporting long-term service delivery through sustainable infrastructure management. It enables evidence-based decision-making, optimizes investment, and provides accountability to residents. The plan positions Burlington to responsibly manage nearly **$7.1 billion** in infrastructure assets while navigating and meeting the challenges of aging infrastructure, climate change, community expectations, and population growth, while maintaining fiscal responsibility and service excellence.

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1.0 Introduction

The City of Burlington (City) is situated between Lake Ontario and the Niagara Escarpment, forming part of the Greater Toronto and Hamilton Area (GTHA). The City's strategic location offers residents and businesses access to natural beauty, urban amenities, and major transportation corridors. Burlington is a mid-size, lower-tier municipality within the Regional Municipality of Halton Region with a current 2024 population of 194,100 residents (including census undercount).[1]

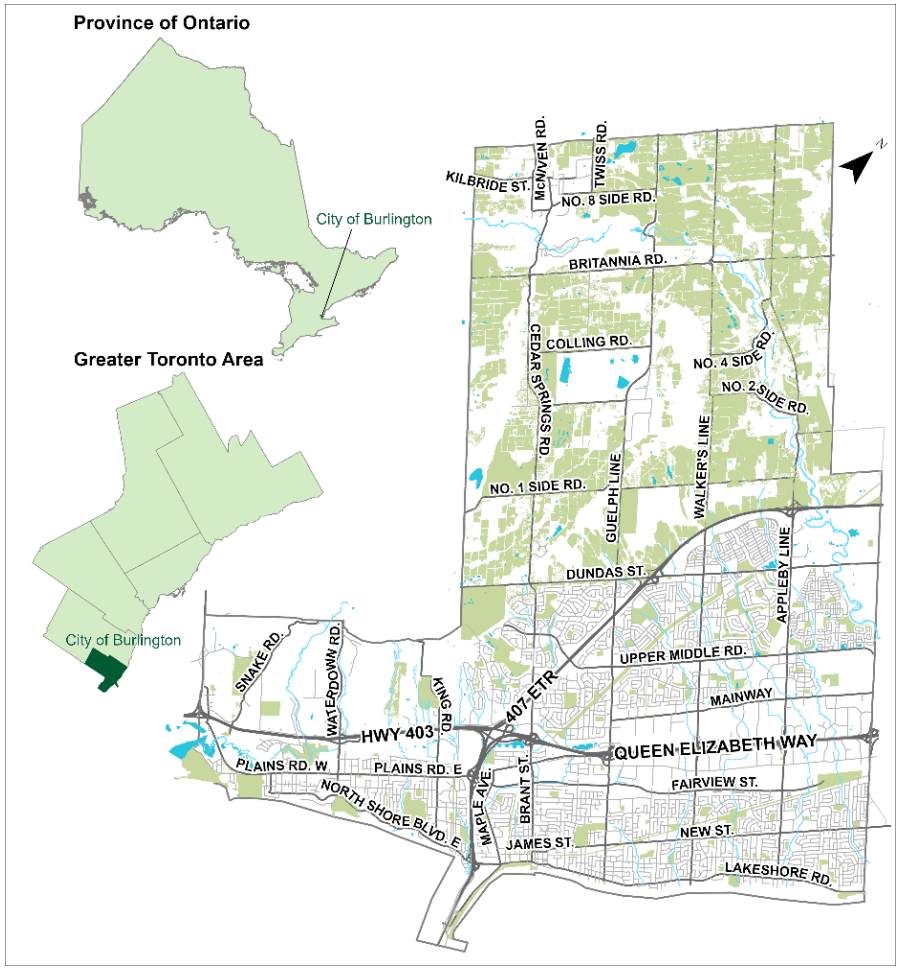
The City's population is forecasted to grow to 217,400 by 2034, 240,050 by 2041, and 265,160 by 2051,[2] representing an overall growth of 71,060 persons (37%). See map of the City of Burlington in **Figure 1-1**.

To support both the current population and future growth, the City has infrastructure in place to provide services to the community. This infrastructure supports the basic functions, safety, and quality of life for all residents, businesses, and visitors.





Figure 1-1: Map of the City of Burlington



1 City of Burlington. 2023. Appendix A Development Charges and Community Benefits Strategy Draft Growth Assumptions Report (Staff Report F-25-23). Retrieved from https://burlingtonpublishing.escribemeetings.com.

2 Halton Region Regional Official Plan Amendment No. 49. Retrieved from https://www.halton.ca/

1.1 Overview, Purpose and Scope

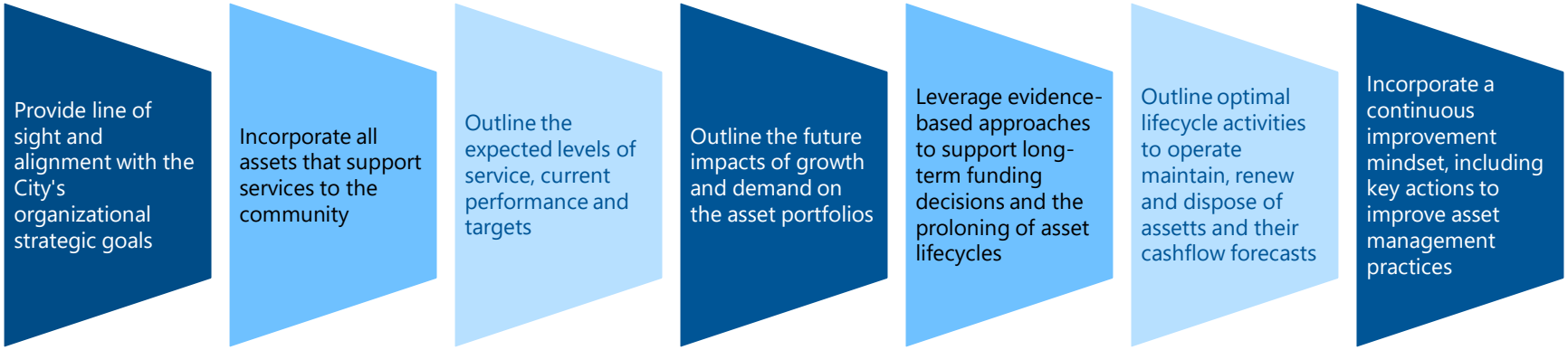
Asset Management is a critical component of organizational sustainability, enabling informed decision-making that aligns with strategic goals, regulatory requirements, and financial constraints. Asset Management Plans are documents developed by the City that specify the activities, resources and timescales required for an individual asset, or grouping of assets, to achieve the defined levels of service objectives. The 2025 Asset Management Plan helps the City make the best possible decisions regarding the construction, operation, maintenance, renewal, replacement, expansion, and disposal of infrastructure assets while minimizing risk and cost to the community and maximizing service delivery.

In addition, the AMP intends to:

- Guide the consistent application of standards, best practices, and tools;
- Support effective service delivery through the sustainable management of the City's infrastructure;
- Align investments with infrastructure priorities to deliver established levels of service in a financially responsible manner;
- Provide input into long-term infrastructure plans and the City's budget;
- Document existing and planned work practices and procedures;
- Support business cases for key infrastructure investments and funding opportunities;
- Develop sustainable financing plans;
- Support discussion on the setting of levels of service targets; and
- Meet legislative requirements.

The plan is based on the guidelines set by the Ontario Ministry of Infrastructure's Building Together Guide for Municipal Asset Management Plans and Ontario Regulation 588/17 under the Infrastructure for Jobs and Prosperity Act. The plan provides an understanding of the infrastructure owned by the City, what it is worth, the condition it is in, the levels of service it is expected to provide, the activities to support that level of service and the funding required. Displayed in **Figure 1-2** are the City's guiding principles for the development of the Asset Management Plan.

Figure 1-2: Guiding Principles for Asset Management Plans



Reporting on asset management for municipalities serves several key purposes:

- **Transparency and Accountability**: It helps local governments provide clear and accurate information to residents, officials, and stakeholders about how public assets (such as roads, parks, and buildings) are maintained and utilized;
- **Financial Planning**: Proper reporting ensures municipalities can budget effectively, allocate resources wisely, and plan for future investments or repairs without financial strain;
- **Regulatory Compliance**: Many municipalities must report on asset management to meet provincial or federal guidelines and funding requirements;
- **Risk Management:** Understanding the condition and lifespan of assets helps prevent unexpected failures and costly emergency repairs;
- **Improved Decision-Making**: Municipal leaders use asset management reports to prioritize projects, make informed policy decisions, and optimize service delivery; and
- **Sustainability and Long-Term Planning**: Asset management reporting ensures infrastructure and services remain viable for future generations by supporting proactive maintenance and upgrades.

The AMP aims to cover all infrastructure assets that support service to the community, as displayed in **Table 1-1.**

The scope of this AMP includes the infrastructure owned and operated by the municipality. This includes specific plans for the infrastructure portfolios that are fundamental to the well-being and livability of the community, including: transportation; stormwater; recreation, community and culture; urban forestry; parks; corporate facilities; transit; fire; parking; information technology; and corporate fleet.

Table 1-1: Asset Hierarchy for the Assets Included in the Asset Management Plan

Service Area	Asset Class	Asset Type
 **Transportation**	Roadways	Pedestrian Network
		Roads
	Structures	Bridges
		Major Road Culverts
		Noise Walls
		Retaining Walls
	Traffic Control and Safety	Guiderails
		Signs
		Streetlights
		Traffic Signals
 **Stormwater**	Stormwater Conveyance	Catch basins, Maintenance Holes and Structures
		Minor Road Culverts
		Storm Sewer Pipes
	Stormwater Management	Minor Treatment
		Open Conveyance
		Stormwater Management Facilities
 **Recreation, Community and Culture**	Community Facilities	Community Centres
		Joint Venture
		Pavilions
		Specialty Facility
		Specialty Facility - Heritage
		Specialty Facility - Revenue Generating
	Culture Facilities	Arts Facilities
		Libraries
		Libraries - leased space

Service Area	Asset Class	Asset Type
		Museums
		Public Art
	Recreation Facilities	Arenas
		Pools
		Specialty Facility
 **Urban Forestry**	Other	Other
	Park and Open Space	Park and Open Space
	Street	Street
	Woodland	Woodland
 **Parks**	Parks Amenities	Community Garden
		Leash Free Areas
		Multi-Use Courts
		Park Signs & Gateways
		Playgrounds & Fitness Equipment
		Shade Structures
		Site Furniture
		Site Provisions
		Skateparks
		Splash Pads
		Sports Fields
		Tennis, Pickleball
		Unique Assets
	Parks Facilities	Boardwalk
		Maintenance Buildings
		Washroom Buildings
	Parks Linear	Fencing

Service Area	Asset Class	Asset Type
		Multi-Use Trails
		Pedestrian Bridges and Piers
		Railings, Retaining Walls and Stairs
		Servicing
		Shoreline Protection
		Sports fields
 **Corporate Facilities**	Administration Buildings	Animal Shelter
		Cemetery Operation
		City Hall
		Greenwood Cemetery
		Office Building
		Operations Centre
 **Transit**	Bus Stops	Concrete
		Shelter
	Transit Equipment	Transit Equipment
	Transit Facilities	Bus Terminal
		Transit Operations
	Transit Vehicle	Conventional Bus
		Specialized Bus
		Support
 **Fire**	Fire Equipment	Fire Equipment
	Fire Vehicle	Fire Vehicle
	Fire Stations and Facilities	Fire Stations and Facilities
	Parking Equipment	Parking Equipment
	Parking Facilities	Parking Garage

Service Area	Asset Class	Asset Type
 **Parking**		Parking Services Building
	Parking Lots	Corporate Lots
		Downtown Lots
 **Information Technology**	Hardware	Hardware
	Software	Software
 **Corporate Fleet**	Corporate Equipment	Heavy Equipment
		Heavy Equipment (Off Road)
		Light Equipment
		Light Equipment (Off Road)
		Medium Equipment
		Medium Equipment (Off Road)
	Corporate Vehicle	Heavy Vehicle
		Light Vehicle
		Medium Vehicle

1.2 Asset Management Legislative Context

The province's "Building Together: Guide for Municipal Asset Management Plans," published in 2012, was developed to encourage and support municipalities in Ontario to produce AMPs in a consistent manner. The guide provided an initial general framework for plan structure and recommended content within the plan sections related to the State of Local Infrastructure, Levels of Service, Asset Lifecycle Management Strategies and Financing Strategies.

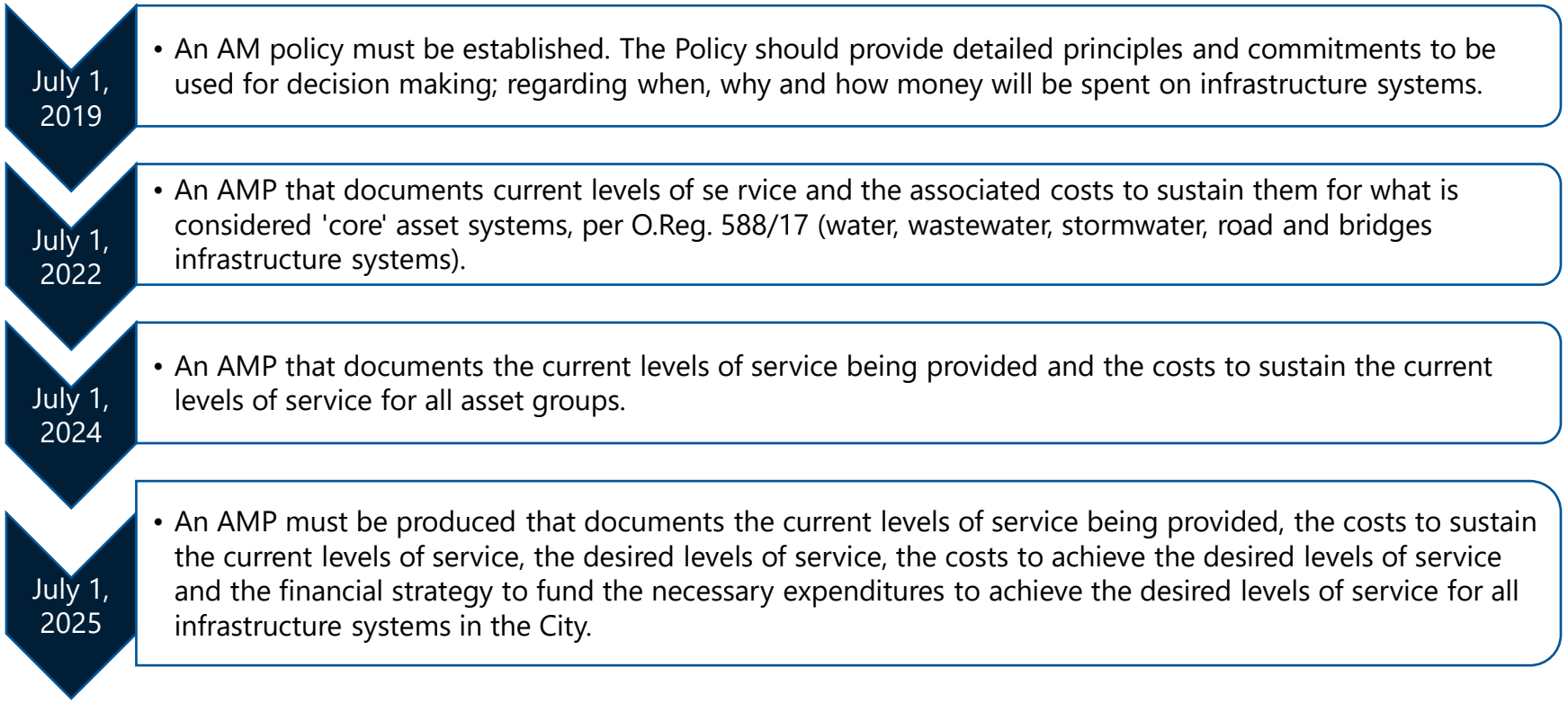
In 2015, Ontario adopted the Infrastructure for Jobs and Prosperity Act, which confirmed the role that municipal infrastructure systems play in strengthening local economies. Following a year-long industry review process, the province created Ontario Regulation 588/17 - Asset Management Planning for Municipal Infrastructure as the first regulation made under the Infrastructure for Jobs and Prosperity Act. The regulation sets out the legal framework for asset management planning in Ontario and expands upon the Building Together guide by mandating specific requirements for municipal asset management policies and plans, phased in over a five-year period.

The provincial and federal governments have made having a council-approved municipal AMP a prerequisite to grant funding eligibility, as well as access to gas tax funding, now known as the Canada Community-Building Fund.

This AMP has been produced to comply with the July 1, 2025 stated requirements in the regulation.

Figure 1-3 summarizes the general timelines and requirements detailed in O. Reg. 588/17.

Figure 1-3: General Timelines and Requirements for O. Reg. 588/17



1.3 Strategic Asset Management Policy

As per Ontario Regulation 588/17, every municipality must have a strategic policy that:

- Articulates principles (e.g., sustainable service delivery, risk-based planning).
- Describes how asset management is integrated with financial planning, budgeting, and land-use planning.
- Outlines roles and responsibilities of staff and council.

- Commits to continual improvement and AMP updates every 5 years.

To meet the regulation, and support the City's vision, the **Strategic Asset Management Policy** was written and then approved by Burlington Council in 2019. The policy aligns with the Strategic Plan by affirming the City's ongoing commitment to ensure consistent asset management processes.

This policy is a high-level statement that outlines the **principles** that guide staff in the development and administration of the Asset Management program, including:

- **Holistic:** The City shall take a comprehensive approach to asset decision support and investment planning that considers the "big picture" and the combined impact of the whole asset life cycle. The City shall consider all assets in a service context and take into account the relationships between different asset types/classes to better optimize decision-making.
- **Strategic and Forward Looking**: To meet future challenges the City shall take a long-term view when making decisions about infrastructure, including consideration of changing demographic and economic trends and future legislative requirements.
- **Health and Safety Focus**: The City shall ensure that the health and safety of employees involved in the construction, renewal and maintenance of infrastructure is protected.
- **Customer Service Focus:** The City shall have clearly defined levels of service that are focused on both customer outcomes and service delivery while balancing customer expectations with risk and affordability. The City will actively encourage community and stakeholder collaboration to better understand current and future stakeholder needs, to ensure they are incorporated into our asset management plans.
- **Systematic:** The City shall adopt a formal, consistent, and repeatable approach to asset management that is transparent and leverages data for evidence-based decision-making.
- **Risk-Based:** The City shall manage the risk associated with attaining defined levels of service by ensuring that resources, expenditures, and priorities are allocated based on risk and associated cost/benefit and risk tolerance.

- **Value-Based Affordable:** The City shall make asset investment decisions based on balancing service, risk and whole life cost. Asset lifecycle treatments chosen will aim to reduce the overall costs to the City while still meeting defined levels of service. The City shall apply full lifecycle costing principles when evaluating capital and operating asset investments.
- **Sustainable:** The approach to service delivery is financially achievable over the long term, is not wasteful of resources, and minimizes the impact of infrastructure on the environment by augmenting resilience to the effects of climate change. The City shall take a "triple bottom line" approach to managing assets and making both short- and long-term infrastructure investment decisions.
- **Environmentally Conscious:** The City shall minimize the impact of infrastructure on the environment and manage the risks and the increased cost required to manage risks due to climate change. The City shall develop an approach for integrating climate change considerations throughout the asset management.

The policy provides a clear governance structure by highlighting the roles and responsibilities of staff who make infrastructure-related decisions.

For the complete Strategic Asset Management Policy, refer to **Appendix A-1**.

1.4 Supporting the City's Strategic Goals

Aligning asset management to municipal strategic plans and goals is essential for ensuring that infrastructure investments support a city's broader vision for growth, sustainability, service delivery, and fiscal responsibility. When asset management is integrated into strategic planning, it can support evidence-based decision-making and long-term resilience.

The benefits of this alignment include:

- **Strategic Consistency:** Asset investments are significant budget drivers. Aligning them with the strategic plan ensures infrastructure spending directly supports the municipality's priorities (e.g., economic development, environmental stewardship, public safety).
- **Enhanced Accountability:** Clear alignment demonstrates to the council, staff, and the public that infrastructure decisions are made in a transparent and goal-oriented way.
- **Improved Service Delivery:** Strategic goals often include commitments to service quality, equity, and sustainability. Asset management helps measure and maintain levels of service in alignment with those outcomes.
- **Informed Trade-Offs:** Asset management provides data on risks, conditions, and lifecycle costs, enabling leaders to prioritize projects in line with strategic objectives rather than just short-term needs.

1.5 Burlington's Current Strategic Planning Approach

1.5.1 Strategic and Corporate Plan Alignment

Burlington's Vision 2040 Strategic Plan outlines the City's vision, values, and strategic objectives for addressing Burlington's needs over a 25-year period (2015 – 2040). The City's assets support these objectives by providing the tangible infrastructure needed to provide services to the community. The development of Burlington's new 25-year long-term strategic plan is currently underway. This plan will serve as the City's foundational roadmap for guiding decision-making around growth, sustainability, service delivery, and governance to 2050.

The Asset Management Plan (AMP) aligns with a number of key strategic directions and objectives within Vision 2040. Specifically, the strategic direction of **An Engaging City** focus is on **enhancing sound decision-making in supporting good governance**. Through this direction, the City **aspires to have in place sound decision-making processes and ensure that City infrastructure is in good condition**.

Figure 1-4: Burlington's Strategic Plan 2015-2040 Report Cover



As documented in the Strategic Plan, the City is undergoing a significant shift with numerous demographic and economic changes. As this transition occurs, planned investments will need to be made in existing infrastructure while also staying focused on future infrastructure growth.

1.5.2 The 5-Year Corporate Strategy

The Corporate Strategy **"Corporate Compass"** was approved by City management and endorsed by Council in 2025. This is where Burlington's strategic directions, perspectives, and objectives reside, driving organizational performance and accountability over a 5-year period.

The Corporate Strategy consists of a series of four strategic directions and perspectives connected to key corporate objectives and key performance indicators (KPIs) and targets. This ensures strategic alignment across City divisions and departments, improves operational decision-making, and reflects changes in budget allocations.

Table 1-2: Corporate Strategy – The Corporate Compass

Strategic Direction	Strategic Perspective	Asset Management Contribution
Build Transparency and Trust	Drive financial sustainability	Forecasting lifecycle costs and funding gaps to inform objectives tied to financial stewardship.
Deliver Positive Community Impact	Optimize resource planning and utilization.	Understanding asset condition, performance and need can support investment prioritization and maximize service value.
	Strengthen community resilience and environmental sustainability.	Planning for stormwater upgrades and flood mitigation infrastructure.

1.6 Supporting the City's Capital Budget Process

The 2025 Asset Management plan supports the City's Capital Budget by aligning infrastructure needs with financial planning and strategic priorities. It helps to ensure that financial resources are allocated efficiently and sustainably. Specifically, the plan acts to:

- Identify annual and long-term infrastructure reinvestment needs
- Recommend required state of good repair asset renewal and replacement
- Support prioritization of key investments
- Support Financial Forecasting

Figure 1-5: Burlington's 2025 Budget Report Cover



The process of developing the City of Burlington's Capital Budget and Forecast is closely informed and guided by the recommendations and priorities established in the AMP. This alignment ensures that limited capital resources are allocated effectively, maximizing asset performance and service delivery outcomes.

How asset management processes integrate with the development of the Capital Budget and Forecast is presented in **Section 6.0**.

1.7 Relationship to Other Municipal Plans

In addition to the Strategic Asset Management Policy, budget process, and organizational strategic objectives, this AMP was developed in alignment with several corporate documents to ensure the City makes the best possible decisions regarding infrastructure needs while minimizing risk and cost to taxpayers and maximizing service delivery. It provides insights into the medium-term infrastructure needs, which help guide planning documents, including the Burlington Official Plan and Financial Plans. Together, these documents (listed in **Table 1-3**) provide a framework for asset management across the City.





Table 1-3: AMP Alignment to Key City Planning Documents

City Planning Documents	Asset Management Plan Alignment
Burlington Official Plan	The AMP incorporates infrastructure related to land-use policies for long-term growth and development.
Financial Plans and Studies	Several financial plans and studies have been developed that provide recommended capital investment requirements or fiscal reporting. These include: • Long Term Financial Plan (LTFP) • Development Charges (DC) Background Study • Tangible Capital Assets (TCA) Policy • Multi-Year Community Investment Plan (MYCIP)
Climate Resilient Burlington (CRB) Plan	The City's climate adaptation strategy. A 10-year plan to adapt to a changing climate and prepare for a "warmer, wetter and wilder" future.
Service-Specific Master Plans and Strategies	Several approved/endorsed master plans have been developed that introduce recommended capital investment requirements. The AMP uses goals and projections from master plans to align better decision-making. These include: • Integrated Mobility Plan • Fire Master Plan • Transit Business Plan • Live and Play Plan • Parks Provisioning Master Plan • Urban Forestry Master Plan and Woodland Management Strategy • Green Fleet Strategy • Corporate Energy and Emissions Management Plan (CEEMP)

1.8 Levels of Service

Municipal asset management should be informed by evidence. An evidence-informed approach begins by documenting the current state of asset management. Measuring current asset performance requires a focused and relevant set of performance indicators. These indicators should reflect core performance attributes of municipal assets, such as condition/quality, lifecycle sustainability, and reliability.

Asset management is fundamentally centered on the services that a municipality provides to its end-users. The Levels of Service (LOS) is a combination of indicators that reflect the social and economic goals of the municipality and link an asset's performance to its target performance goals. LOS is measured from the community perspective and from the technical perspective

Levels of Service (LOS) describe the quality, function and capacity of the City services being delivered. This section of the AMP describes measures for determining the LOS provided by each service area. LOS measures for each service area are established through discussions with City staff or are mandatory metrics as described in O. Reg. 588/17. Levels of Service (LOS) is further examined in **Section 4.0**.

1.9 Risk and Climate Change Considerations

Risk is a foundational consideration in asset management, helping organizations understand and respond to the potential impacts of both internal and external threats to service delivery. Internal risks may include asset failure, maintenance issues, or budget constraints, while external risks can stem from regulatory changes, supply chain disruptions, or environmental factors.

Climate change introduces additional complexity, increasing the frequency and severity of weather-related events and long-term shifts that can accelerate asset deterioration or affect demand for services. Risk and climate change

considerations are woven throughout the asset management process, supporting more resilient planning, prioritization, and investment decisions.

The City's Asset Management Program is aligned with and connected to the City's climate change adaptation plan: Climate Resilient Burlington Plan (2022), through several actions identified in the Plan.

These topics are further discussed in **Section 5.0.**

1.10 Growth Considerations

The City of Burlington and the community work together to develop its' Official Plan, which is a tool for the municipalities to manage growth and development. The Plan outlines long-term visions of the community and quality of life for Burlington residents through statements of objectives and policies. The plan also provides policy direction on land use development and recourse management to guide the future planning and development of the City of Burlington.

The demand placed on the City's infrastructure will change over time based on several contributing internal and external factors, including growth. One effect that growth will have on the City's assets is increased demand resulting in accelerated deterioration of the existing asset portfolio. Planning for population growth may also require expanding the infrastructure network (e.g., roadways, sewer systems, etc.) to ensure the appropriate level of connectivity is maintained throughout the City. Additionally, as the asset portfolio increases due to the assumption of new developments, maintenance and renewal of the new assets will require more resources, including operation, maintenance workforce and operation and capital budgets. The impact of Growth is further examined in **Section 5.0.**

1.11 Asset Management Strategies

The asset lifecycle management strategy is a set of planned actions that will allow the assets to provide desired LOS in a sustainable way at the lowest lifecycle cost (i.e., through preventative action) while managing risk. This section describes the asset lifecycle activities applied to the asset category, the forecasted lifecycle activity costs and the optimal budget to maintain the current LOS. The approach to these items is described below.

Lifecycle activities describe planned actions that can be performed on an asset over its lifetime, from construction to decommissioning. These activities are typically grouped into the following categories, as displayed in **Table 1-4**. Each service area section also explains the associated risks with each lifecycle activity.

Table 1-4: Typical Asset Lifecycle Activities

Lifecycle Activity	Description	Examples
Non-Infrastructure	Actions or policies that can lower costs or extend asset life.	Better integrated infrastructure planning and land use planning, demand management, process optimization, and managed failures.
Maintenance	Regularly scheduled inspection and maintenance, or more significant repair and activities associated with unexpected events.	Sewer spot repairs, fixing potholes.
Rehabilitation	Significant treatments are designed to extend the life of the asset.	Structural lining of sewers, road resurfacing, facility revitalization.
Replacement	Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehabilitation is no longer an option.	Sewer replacement, road reconstruction.
Disposal	Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed.	Salvage of equipment.
Expansion	Planned activities required to extend services to previously un-serviced areas - or expand services to meet growth demands.	New recreation centre to service new subdivision.

Asset Lifecycle Strategies are further examined in **Section 5.0.**

1.12 Continuous Improvement

Moving forward, the City plans to update the asset inventory and condition information on an annual basis. As per O. Reg. 588/17 requirements, this annual update will include a review of the City's progress in implementing the AMP, any factors impeding the implementation of the AMP and a strategy to address these factors. A more comprehensive update to the AMP will be completed every five years, with the next update proposed for 2028.

In addition, the City will maintain an improvement and monitoring program to enhance future revisions to this plan. The City applies the continuous improvement methodology indicated in **Figure 1-6** to enhance the Asset Management systems and more effectively deliver desired Asset Management outcomes.

Figure 1-6: Plan-Do-Check-Act Cycle



Assumptions and limitations are outlined within each section of the plan to highlight gaps and identify opportunities for improvement.

More details can be found in **Section 7.0**.

1.13 Content in the AMP

The AMP is organized in the following sections:

- **Section 1: Introduction:** An overview of key asset management concepts, alignment with regulation and the City's strategic plan.
- **Section 2: State of Local Infrastructure:** A summary of the quantity and replacement cost of assets, a summary of the physical condition based on inspections, performance or deterioration models. The State of Local Infrastructure for each service area is presented in **Appendix B**.
- **Section 3: Public Engagement:** Highlights from the public engagement survey and focus group to inform the selection of proposed Levels of Service.
- **Section 4: Levels of Service:** An overview of both **Community LOS** (qualitative, community-focused) measures and **Technical LOS** (performance-based) measures. The current LOS are presented in **Appendix B** for each service area.
- **Section 5: Asset Management Strategies and Key Considerations:** An overview of lifecycle strategies, growth planning and risk management:
    - Detailing the activities planned over the asset's life (maintenance, renewal, replacement) to achieve the desired LOS; amd
    - The risks associated with the lifecycle options.
- **Section 6: Asset Investment and Financing Strategy:** A review of asset investment levels and the proposed Levels of Services delivered over the 10-year planning horizon, as well as the recommended financing strategy. Forecast of capital and operating costs, funding sources, and strategies to address funding gaps.
- **Section 7: Continuous Improvement and Monitoring:** Identify the roadmap of actions for advancing asset management practices at the City.
- **Appendix A:** Includes reference documents such as the policy and public engagement results.
- **Appendix B:** Presents the State of Local Infrastructure sections for each service area.



2.0 State of Local Infrastructure

Understanding the state of local infrastructure is critical for ensuring sustainable urban development, economic growth, and quality of life for Burlington residents. Municipalities manage a vast network of assets, including roads, bridges, stormwater systems, fleet and facilities, many of which require ongoing investment and maintenance. Aging infrastructure, climate change impacts, and evolving community needs present challenges that demand strategic planning and financial commitment. By assessing the current condition of assets and prioritizing investments, the City can enhance service delivery, reduce long-term costs, and support resilient communities.

The City's infrastructure can be generally described as being "mid-life." Burlington experienced significant and rapid growth over several decades, and the infrastructure built and assumed during those years is reflected in the current infrastructure state. Some assets are at an early lifecycle stage, while others are reaching the end of their service lives and need replacement or renewal. The City's infrastructure can also be described, on average, as in a Good condition state.

2.1 Assets Included in the AMP

The Asset Management Plan includes all infrastructure assets that are owned and managed by the City of Burlington, based on year-end 2024 information. Assets are presented within service areas to reflect how the infrastructure contributes to delivering City services. The service area grouping also allows for monitoring of service levels, performance metrics, and outcomes. This structure is considered best practice (ISO 55000) and supports compliance with regulatory standards and requirements. See **Table 2-1** for the asset hierarchy of the 11 service areas and the associated 30 asset classes, presented in descending order of current replacement value.

Table 2-1: Asset Hierarchy - Service Area and Asset Class

Service Area	Asset Class
Transportation (Appendix B-1)	Roadways
	Structures
	Traffic Control and Safety
Stormwater (Appendix B-2)	Stormwater Management
	Stormwater Conveyance
Recreation, Community, and Culture (Appendix B-3)	Recreation
	Community
	Culture
Urban Forestry (Appendix B-4)	Street Trees
	Woodland
	Park and Open Space
	Unassigned
Parks (Appendix B-5)	Parks Linear
	Parks Amenities
	Parks Facilities
Corporate Facilities (Appendix B-6)	Administration Buildings
Transit (Appendix B-7)	Bus Stops
	Facilities
	Equipment
	Vehicles
Fire (Appendix B-8)	Stations and Facilities
	Fire Vehicles
	Fire Equipment
Parking (Appendix B-9)	Parking Lots
	Parking Facilities
	Equipment
Information Technology (Appendix B-10)	Software Applications
	Hardware Systems and Devices
Corporate Fleet (Appendix B-11)	Vehicles
	Equipment

2.2 Overall State of Local Infrastructure

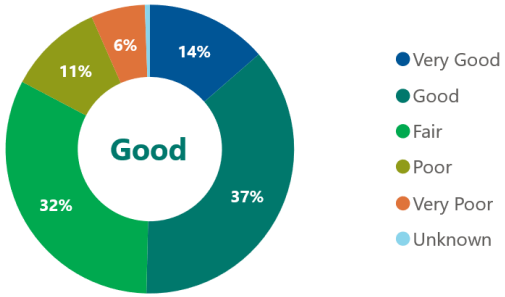
Figure 2-1: State of Local Infrastructure – Overall Corporate Scorecard

Replacement Value	Average Condition	Risk Rating	Overall Data Confidence	Average Age | Service Life
$7.15bn	Good	Low	B	33 | 65

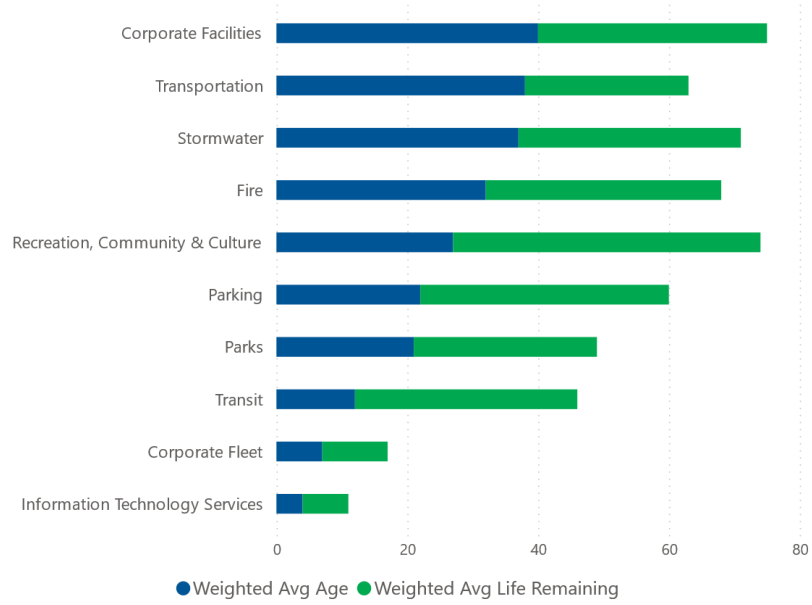
Average OSI Condition



Asset Condition



Average Age and Remaining Service Life



2.2.1 Data Sources and Confidence

The data needed to support the AMP comes from a combination of different City system sources including systems presented in **Table 2-2**.

Table 2-2: Sources of Data for the AMP

Source	Description
ESRI (GIS)	Geographic Information System (GIS) - acting as the source system for all core and location-based assets; used to collect, organize and integrate data.
RoadMatrix Pavement Management System (RPMS)	Used to store roadway condition data. It is an analytical tool used to identify road pavement strategies and forecasts for preventative maintenance, renewal, and reconstruction timing.
Vanderweil Facility Advisors (VFA)	Used to manage the inventory of all corporate buildings and to support budget modelling, requirements forecasting and capital planning for the Facilities Assets & Sustainability (FAS) portfolio.
Microsoft Excel and SharePoint	Widely used for assets currently not stored in any dedicated asset management software.
Workday Financial Management (ERP)	Enterprise Resource Planning (ERP) solution.
Questica	Financial tool used to track planned capital projects and expenditures.
Brightly Predictor	EAMS Decision Support Solution (DSS) for asset data analysis, risk assessment and modelling.
CTSpec	Platform for managing the inspection, condition assessment, and maintenance of stormwater conveyance systems.
MESH	Used for managing traffic sign inventory and condition information.
TreePlotter	Used by urban forestry to enable tree asset inventory, maintenance and assessment.

The City is currently developing an Enterprise Asset Management Solution (EAMS) in order to have a more centralized inventory with a high level of asset data standards.

Maintaining accurate and reliable asset information is important because it acts as a foundation for decision-making. This information can be used to estimate current and future needs, which supports the planning process and allows the City to be more proactive than reactive.

Data confidence in the Asset Management Plan refers to the trustworthiness, accuracy, and completeness of the data used to assess asset performance, risks, and lifecycle costs. See **Table 2-3** for description of ratings for data accuracy and completeness and **Table 2-4** for data confidence grades.

Table 2-3: Description of Ratings for Data Accuracy and Completeness

Rating	Completeness Description	Accuracy Description
Very High	Inventory is complete and well-documented. Assuming >95% of assets have been captured.	No assumptions, and condition, age and replacement value are known/recently updated.
High	Inventory is assumed to be mostly complete, assuming 75 - 95% of assets are captured.	Minor assumptions in condition, age and replacement value are estimated from recent tenders or POs.
Medium	Inventory is moderately complete, assuming 60 - 75% of assets captured.	Moderate assumptions have been made on age or condition, and replacement values are estimated from moderately reliable or dated sources.
Low	Inventory is significantly incomplete, assuming less than 60% of assets are captured.	Data documentation is outdated, with some unknown data attributes (age, condition, replacement value).
Very Low	Inventory is extremely incomplete, assuming <25% of assets are captured.	Large gaps in data in one or more attributes: age, condition and replacement value.

Table 2-4: Data Confidence Grades

Grade	Completeness	Accuracy
A	Very High	Very High
A-	Very High	High
A-	High	Very High
B	High	High
B-	High	Medium
B-	Medium	High
C	Medium	Medium
C-	Poor	Medium
C-	Medium	Low
D	Low	Low
D-	Very Low	Low
D-	Low	Very Low
F	Very Low	Very Low

The key highlights related to data confidence and accuracy include:

- **Data Confidence:** The overall average data confidence grade for the City of Burlington is **'B,'** and both the average Data Accuracy and Data Completeness confidence level are classified as **'High.'**
- **Asset Age and Lifespan**: Weighted by replacement value, the average age of the City's assets is **33 years**, with an average estimated service life of **65 years**. (Note: Heritage buildings, museums, and public art do not have an estimated service life associated with them.)

- **Inventory Trend:** With the implementation of EAMS, it is anticipated that the City's inventory of assets will continue to increase as service areas undergo refinement of data warehousing. Net new additions to the City's asset base networks and portfolios will also occur as infrastructure is expanded, constructed, acquired and assumed through development. This expansion of the City's asset "footprint" has significant and long-lasting impacts. As new assets are added, they must be maintained, rehabilitated, and eventually replaced. These lifecycle costs need to be accounted for in future AMPs and financial strategies.

2.3 Replacement Value

2.3.1 Calculation of Current Replacement Values

Replacement values were developed in various methodologies, depending on the type of asset, and include historic construction or purchase costs, unit costs, standardized costing indices, and system-level assets and components within the facility management system.

1. Of note, not all assets are replaced; some are continually rehabilitated rather than replaced. As such, a replacement value estimate serves as a foundational benchmark to highlight the significance of the infrastructure that supports the service area.

The total Current Replacement Value is $7.1 billion ($2024). See **Figure 2-2** for total asset valuation by service area and **Table 2-5** for replacement value ($2024).

Figure 2-2: Total Asset Valuation by Service Area (largest to smallest)

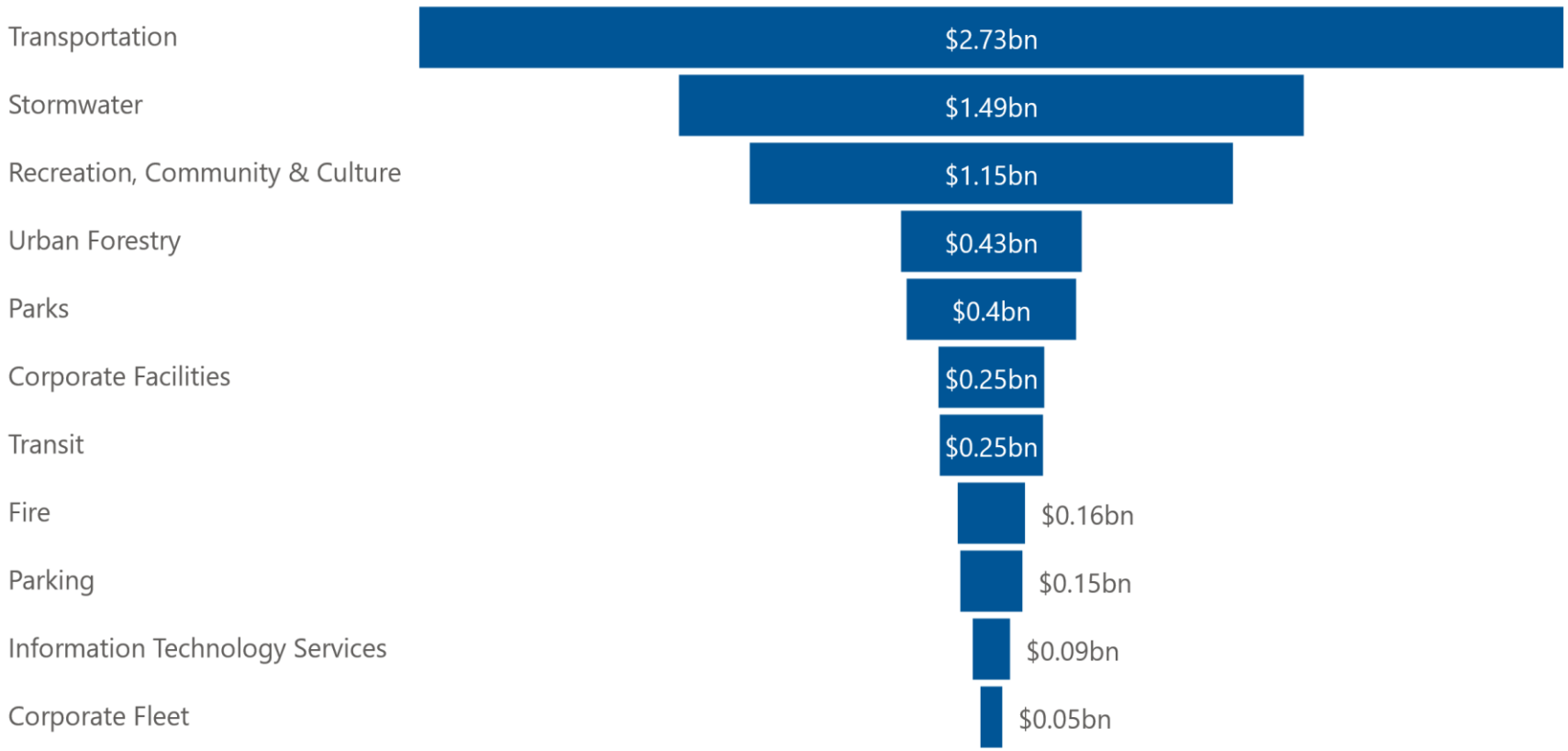
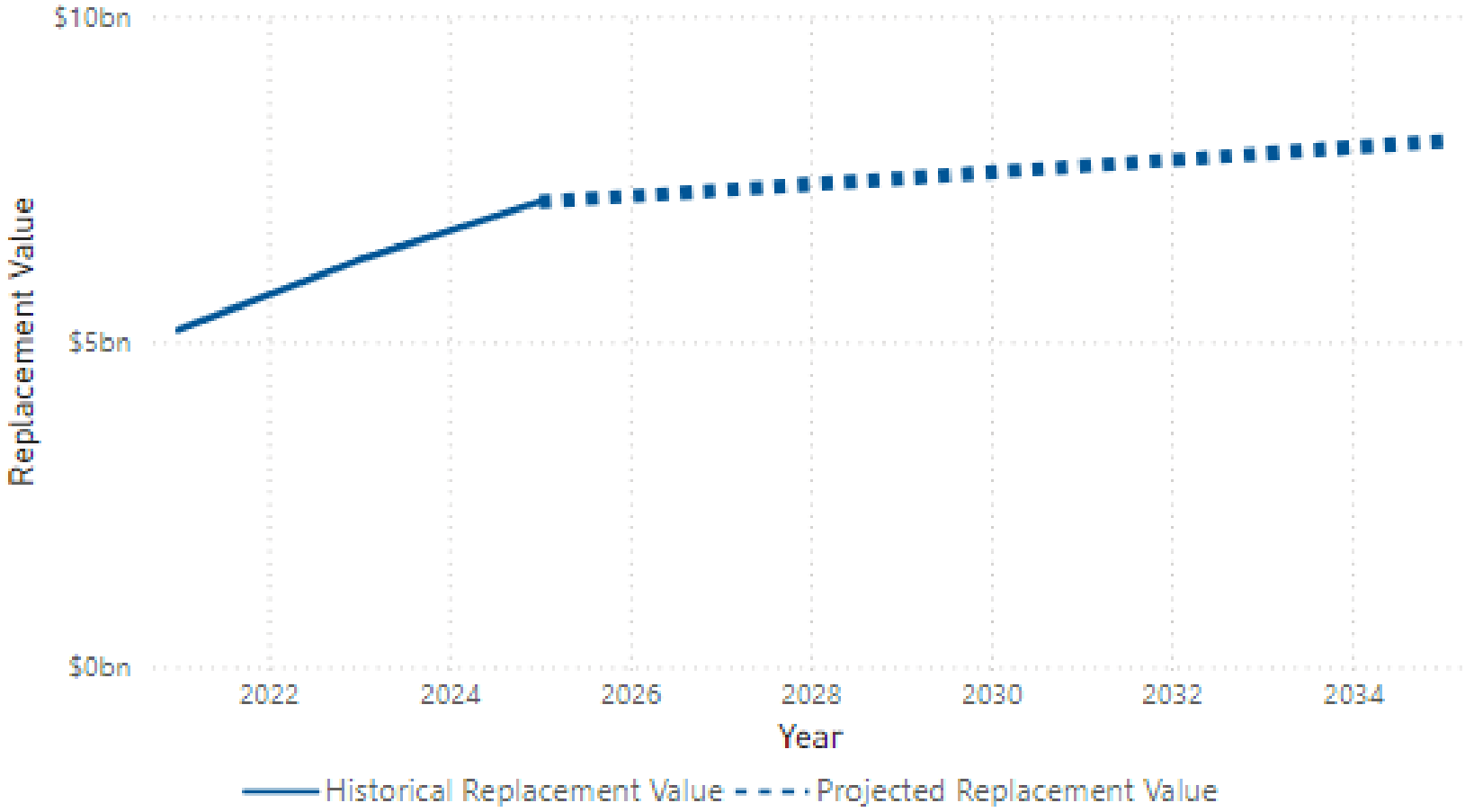


Table 2-5: Replacement Value by Asset Service

Service Area	Replacement Value ($2024)
Transportation	$ 2,726,489,000
Stormwater	$ 1,488,941,000
Recreation, Community and Culture	$ 1,151,483,000
Urban Forestry	$ 430,618,000
Parks	$ 403,808,000
Corporate Facilities	$ 252,083,000
Transit	$ 246,146,000
Fire	$ 160,392,000
Parking	$ 148,037,000
Information Technology	$ 88,826,000
Corporate Fleet	$ 51,915,000
Total	**$ 7,148,739,000**

Replacement Value Trend: Using a 2.5% inflation rate, we can project the City's current asset portfolio to be valued at nearly $9 billion by 2034 (see **Figure 2-3**), but that does not take into account new or enhanced assets due to growth or expansion or any cost-impacts due to tariffs or market supply changes.

Figure 2-3: Projected Replacement Value of Current Assets (2022 to 2034)



2.4 Asset Condition

2.4.1 Condition Assessment

Asset condition is assessed or determined via various methodologies depending on the type of asset and can include visual inspections, assessments, or calculated metrics based on condition, performance, or age as a proportion of its estimated service life.

Asset-specific condition indices based on industry standards are also used, such as Facility Condition Index (FCI) for Facilities, Pavement Quality Index (PQI) for roadways, and Bridge Condition Index (BCI) for Bridges.

Examples of these different types of condition scores are provided below:

- A 20-year-old culvert with a 50-year estimated service life would have a condition score of **60,** with 60% of its service life remaining.
- A road segment with a PQI of **75.**
- A facility with an FCI of **0.04.**
- A bridge with a BCI of **72.**
- A bus stop with a condition score of **4** out of 5.

Note that where an asset's age exceeded its estimated service life but is still in service, a condition score of "0" was assigned to the asset, indicating that it is nearing the end of life.

2.4.2 Condition Rating

Asset condition scores are translated into standardized condition states and performance categories for use in the EAMS–DSS tool, which utilizes an Overall Service Index (OSI) to report on the current and future condition states assets in an asset portfolio.

2.4.3 Overall Service Index

A single condition score or index often does not adequately summarize the performance of an asset. A good example of this is the FCI and PQI metrics. In the case of facilities, the FCI alone is not a suitable indicator of how well the asset is performing or where in its lifecycle that asset currently is. Similarly, the PQI of a roadway segment speaks mostly to the surface condition of the roadway and does not take into consideration the age or condition of the road base below. For facilities and roads, the Overall Service Index (OSI) is based on a weighted expression consisting of the condition index and age. For all other assets, the OSI is based on the single condition score for each asset.

2.4.4 Condition Performance Category

All condition scores and indices can be expressed as a descriptive **Performance Rating.** In the examples provided above, all the assets listed would have a performance of "Good" on scores, according to the Condition Rating Scale used in this AMP and provided below. This Performance Category rating scale aligns with the scale employed by the National Infrastructure Report Card produced by the Federation of Canadian Municipalities (FCM), the Canadian Society for Civil Engineering (CSCE) and the Canadian Construction Association (CCA). In addition to providing a comprehensive basis for assessment, this will allow for benchmarking of the results against the values presented in this document. See **Table 2-6** for asset condition performance rating scale table aligning various condition scores to the condition ratings in this AMP (Very Good, Good, Fair, Poor and Very Poor) and **Appendix A-2** for more information on condition performance rating scale.

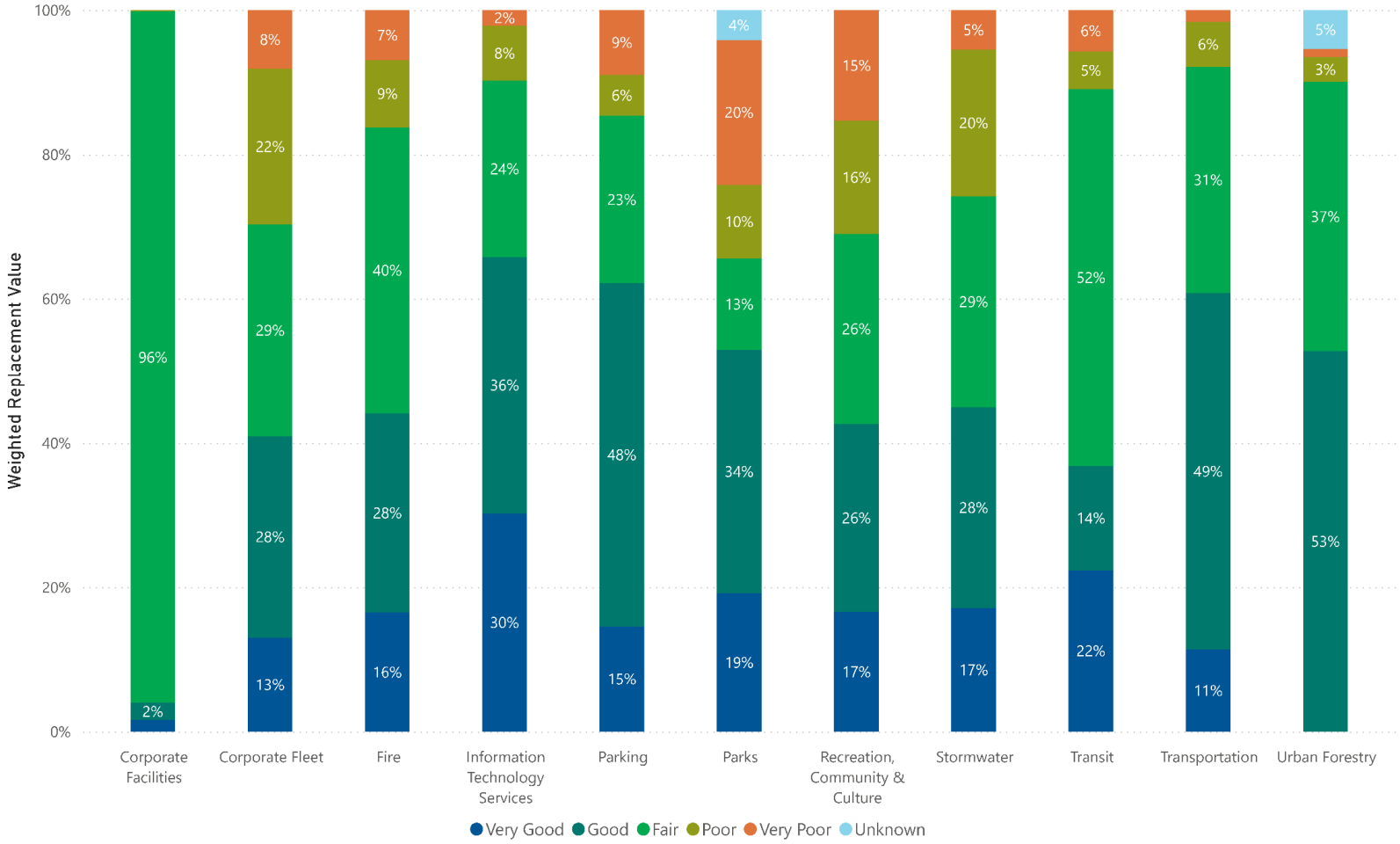
Table 2-6: Asset Condition Performance Rating Scale

Condition Rating	Overall Service Index	Condition Score	Condition Score	FCI	PQI	BCI	Performance or Life Remaining
Very Good	1	100-80	5	0.01 - 0.02	80 - 100	86 - 100	"Very Good" or >80% of life remaining
Good	2	60-79.9	4	0.03 - 0.05	67 - 79	71 - 85	"Good" or 60 –80% of life remaining
Fair	3	40-59.9	3	0.06 - 0.1	55 - 66	61 - 70	"Fair" or 40 – 60% of life remaining
Poor	4	20-39.9	2	0.11 - 0.49	35 - 54	41 - 60	"Poor" or 20 – 40% of life remaining
Very Poor	5	0-19.9	1	0.5 - 1	0 - 34	0 - 40	"Very Poor" or <20% of life remaining

2.4.5 Corporate-Wide Condition Profiles

The current condition profiles for each asset service category are shown in **Figure 2-4**.

Figure 2-4: Asset Condition by Service Category (Percentage of Replacement Value)



The City's assets are experiencing a gradual decline in condition due to factors such as age, utilization, and environmental conditions. This trend is common across municipalities that face constrained capital budgets, deferred maintenance backlogs, and an expanding asset base due to growth. The result will be accelerated deterioration of the City's infrastructure, leading to reduced performance, increased risk of failure, and higher lifecycle costs.

Refer to **Section 6.0** for a summary of the corporate-wide condition profiles based on future forecast scenarios generated as part of this AMP.



2.5 State of Local Infrastructure Summary

See **Table 2-7** for the summary of the state of local infrastructure by service area. See **Appendix B-1 to B-11** for the state of local infrastructure sections by service area.

Table 2-7: State of Local Infrastructure Summary by Service Area

Service Area	Summary
 **Transportation**	1,600 lane kilometers of roadways 17 km pedestrian sidewalks and pathways 47 Bridges 107 Major Culverts 26,000+ Streetlights Average Condition Good Replacement Value: $2.73 Billion Average Age and Service Life: 38 | 64
 **Stormwater**	851 km Storm sewer Pipes 2,700+ Minor Road Culverts 19 Oil and Grit Separators 1 Raingarden 30 Stormwater Management Ponds Average Condition Good Replacement Value: $1.49 Billion Average Age and Service Life: 37 | 71

Service Area	Summary
 **Recreation, Community, and Culture**	9 Community Centres 2 Art Facilities 7 Libraries 3 Museums 7 Arenas 7 Pools 1 Golf Course and Facility Average Condition Good Replacement Value: $1.15 Billion Average age and service life: 27 | 73
 **Urban Forestry**	49,000+ Street Trees 12,000+ Park and Open Space Trees 37 Woodlands Average Condition Good Replacement Value: $431 Million

Service Area	Summary
 **Parks**	111 Sport Fields 18 Splash pads 25 Tennis and Pickleball Courts 9 Community Gardens 9 Leash-Free Areas 20 km Multi-Use Trails 15 Park Washrooms Average Condition Good Replacement Value: $404 Million Average Age and Service Life: 21 | 48
 **Corporate Facilities**	1 Animal Shelter 1 Cemetery 2 Office Buildings 1 Operations Centre Campus Average Condition Good Replacement Value: $252 Million Average Age and Service Life 40 | 75

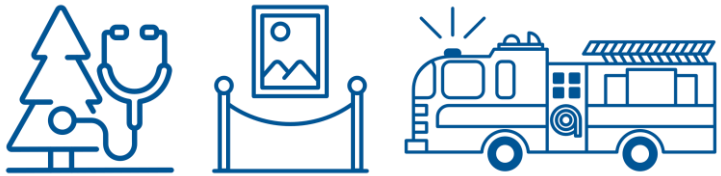
Service Area	Summary
 **Transit**	2 Transit Facilities 74 Conventional Buses 16 Specialized Buses 11 Support Vehicles 823 Bus Stops Mix of Equipment Average Condition Good Replacement Value: $246 Million Average Age and Service Life: 12 | 46
 **Fire**	7 Fire Stations and 1 Headquarters 38 Fire Vehicles Mix of Fire Equipment Average Condition Good Replacement Value: $160 Million Average Age and Service Life: 32 | 68

Service Area	Summary
 **Parking**	2 Parking Facilities Mix of Parking equipment 38 Parking Lots Average Condition Good Replacement Value: $148 Million Average Age and Service Life: 22 | 60
 **Information Technology**	Mix of Hardware (servers, workstations etc.) Mix of Major, Minor and Hosted Solution Software Average Condition Good Replacement Value: $89 Million Average Age and Service Life: 4 |10
 **Corporate Fleet**	Mix of light, medium and heavy vehicles and equipment Average Condition Good Replacement Value: $52 Million Average Age and Service Life 7 |17



In **Appendix B**, each service area incorporates the following in a more detailed State of Local Infrastructure section:

1. A summary of the inventory of assets which support the service area, including types and quantities.
2. A summary of the replacement value of the Asset Classes and Types.
3. The age and remaining service for each Asset Class and Type.
4. Condition ratings of the assets that support each service area (i.e., % of assets in very good condition, weighted by the replacement value).
5. A description of the data sources used to inform this Section, including any relevant condition assessment policies/practices.
6. A summary of the data confidence grade for the asset service category.
7. A summary of current Level of Service performance metrics for the asset service category, including Standard-, Technical-, and Community Levels of Service (if applicable).
8. A summary of Lifecycle Activities for the asset service category and, if applicable, its classes.
9. The Risk Rating that represents the internal risk the asset service category presents to service delivery and examples of external risk the asset service category faces.



3.0 Public Engagement

An important aspect of a municipality's asset management plan is that it reflects the needs and values of the community. Establishing proposed Levels of Service as required by Ontario Regulation 588/17 creates an opportunity for the City to include public engagement in their asset management planning to support decision-making and alignment with the community.

The City carried out a Community Engagement Strategy to support the update of this AMP, with the objective of educating and increasing the public's awareness of Asset Management at the City and gathering insight to help establish the Proposed LOS.

The Community Engagement Strategy consisted of three components:

1. Online Survey;
2. External Focus Group; and
3. Internal Focus Group.

3.1 Online Survey

An online survey was posted on the City's Get Involved platform and ran for three weeks early in 2025. The survey was developed to better understand community expectations on levels of service and aimed to determine the priorities for keeping or changing how infrastructure is managed across various City services. Survey respondents were asked about

their levels of satisfaction with the City-owned and City-managed infrastructure that delivers various services, and willingness to pay for investments in maintaining infrastructure.

The survey was completed by 184 respondents, distributed across a wide range of age demographics.

The asset groups selected for the survey, those that have a level of interaction with the public, included: Transportation, Transit, Parking, Stormwater Flow and Management, Recreation, Community and Culture, Parks, and Urban Forestry.

The survey results highlighted trends in public satisfaction and investment priorities. While areas such as parks, recreation facilities, and urban forestry receive strong support, transportation infrastructure, stormwater management, and transit had more divided opinions. The data suggests that while many residents are generally satisfied with existing infrastructure, there is also significant demand for continued or increased investment in key areas like roads, transit, and stormwater infrastructure.

See **Figure 3-1** for satisfaction scores and **Table 3-1** for a summary of satisfaction, dissatisfaction, and priority asset groups for improvement.





Figure 3-1: Satisfaction with Asset Groups (Percentages)

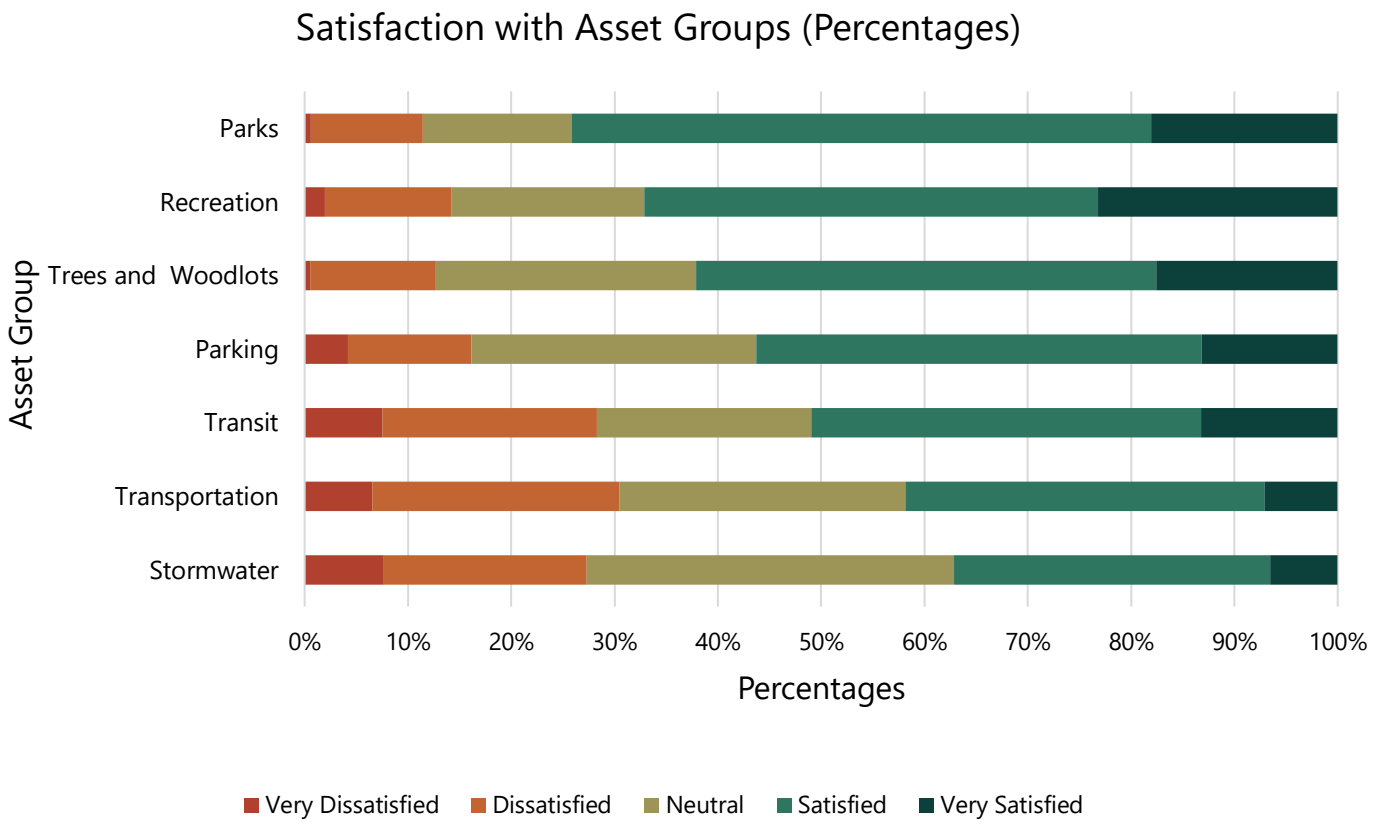


Table 3-1: Summary of Satisfaction and Priority for Improvement

Asset Groups	%Satisfied and Very Satisfied	%Dissatisfied and Very Dissatisfied	Improved or Enhanced
Parks	74.1%	11.4%	49 votes
Recreation, Community and Culture	67.1%	14.2%	54 votes
Trees and Woodlots	62.1%	12.6%	61 votes
Parking	56.3%	16.2%	24 votes
Transit	50.9%	28.3%	47 votes
Transportation	41.9%	30.4%	105 votes
Stormwater Flow and Management	37.2%	27.4%	102 votes

The following responses were provided to the question of which option best reflects willingness to pay in support of infrastructure managed in the City:

- **Increase (44.7%):** The City increase investment in infrastructure, enhancing the reliability/quality of the City's infrastructure;
- **Maintain (40.2%):** The City maintains its current investment in infrastructure;
- **Reduce (8.9%):** The City reduce investment in infrastructure, decreasing the reliability/quality of the City's infrastructure; and
- **Unsure (6.1%):** Unsure of the best response.

For a full summary of the online survey questions and results, see **Appendix A-3.**

3.2 External Focus Group

The external focus group was held one evening in February 2025, consisting of a small group of members of the public who had expressed interest in participating through the City's Community Panel program. The discussion and engagement activities revealed differing perspectives, even within a small group, highlighting the complexity of infrastructure decision-making. While some participants prioritized investments in roads and transit, others advocated for green infrastructure and recreational spaces.

In the end, there was a productive discussion around trade-offs and compromise.

This discussion helped participants relate to the broader challenge the City Council faces in balancing competing priorities.

3.3 Internal Focus Group

A two-part internal focus group with City staff was conducted to gather valuable insights for the AMP update. The first part, a virtual session, took place in January 2025 with over a dozen City staff who were briefed on the scope of the AMP update and the key objectives. The session also aimed to understand the staff's budget commitments, identify what aspects of service delivery are negotiable, and pinpoint non-negotiable priorities.

The second part, an in-person session, took place in February 2025 and served as a deeper dive into the decision-making process by facilitating discussions around potential trade-offs between service levels and budget constraints. These facilitated conversations helped uncover key priorities and potential areas for flexibility, developing an understanding of both operational realities and public expectations. As part of this session, we also facilitated a game where participants from various departments worked in small groups to allocate funding across service levels. This exercise proved highly valuable, giving participants a tangible experience of the challenges of working through infrastructure funding decisions.

City staff emphasized that service commitments are generally documented in department or service area plans, and the feedback clearly outlined several priorities, including maintaining service levels across various sectors. **Table 3-2** presents a summary of asset service-specific priorities and commitments highlighted by the internal focus group.

Table 3-2: Asset Service Category-Specific Priorities/Commitments

Asset Service Category	Priority/Commitment
All Categories	State of Good Repair (SOGR) Secure funding for modernization and upkeep
Recreation, Community, and Culture	Increased participation
Transit	Free transit and increased modal split
Transportation	Development and implementation of IMP
Information Technology	Improved data transparency and security
Fire	Public safety and emergency response, community risk reduction
Transportation, Parks, and Urban Forestry	Maintenance and sustainability
Transportation	Integration of mobility and strategic planning
Corporate Fleet	Implement environmentally sustainable fleet operations.
Urban Forestry	Long-term urban forest management

One of the key takeaways was that many of these commitments are linked to specific timelines or are contingent upon securing the necessary funding. This suggests that while there is strong alignment among departments on priority areas, the realization of these goals will depend significantly on the availability of financial resources. Additionally, a significant risk identified during the session is that without additional funding, current service levels may not be able to be maintained over time.

The financial strategy option that garnered the most support was the option to "protect current service levels with the required capital funding within/across certain asset classes." This strategy reflects the staff's preference for safeguarding existing service levels rather than embarking on new initiatives without ensuring that foundational infrastructure and services are adequately maintained.

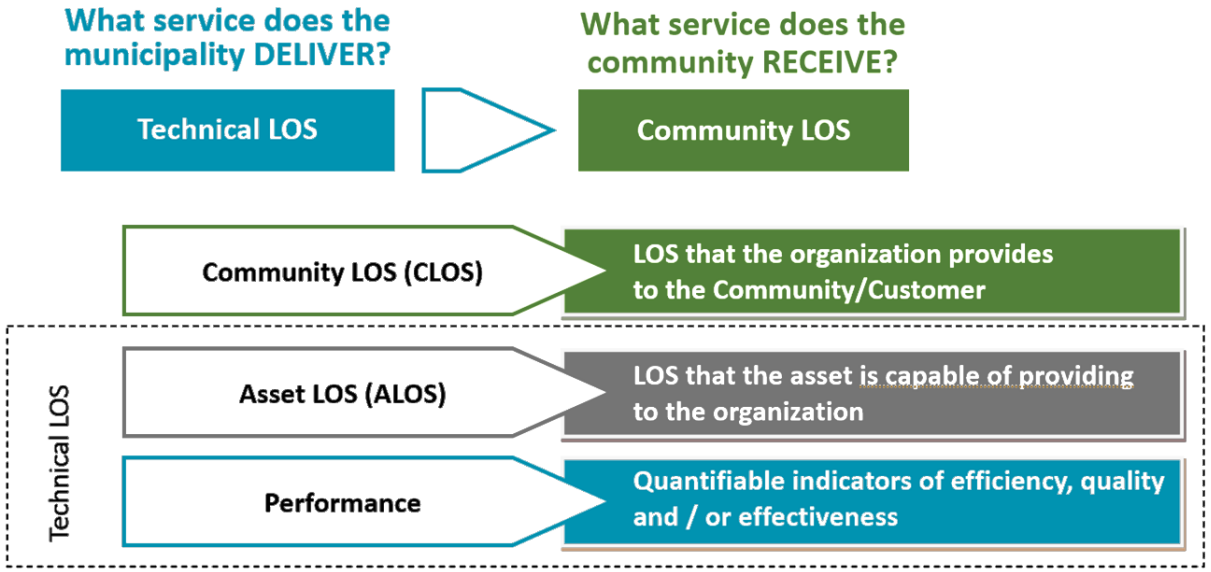
The insight and findings of these three engagement strategies were incorporated into the Proposed Levels of Service scope of the AMP update, discussed in **Section 6.0.**



4.0 Levels of Service

Levels of Service (LOS) describe the quality, function and capacity of the City services being delivered. This section of the AMP describes measures for determining the LOS provided by each service area. LOS measures for each service area are established through discussions with City staff or are mandatory metrics as described in O. Reg. 588/17. See **Figure 4-1** for a definition of Technical LOS and Community LOS.

Figure 4-1: Definition of Technical LOS and Community LOS



Building on the LOS Framework that was developed in the 2021 AMP, the LOS Framework for this AMP was reviewed and refined over a series of workshops with asset service leads. This framework builds on to the 2021 AMP, including the following four elements for each asset service category:

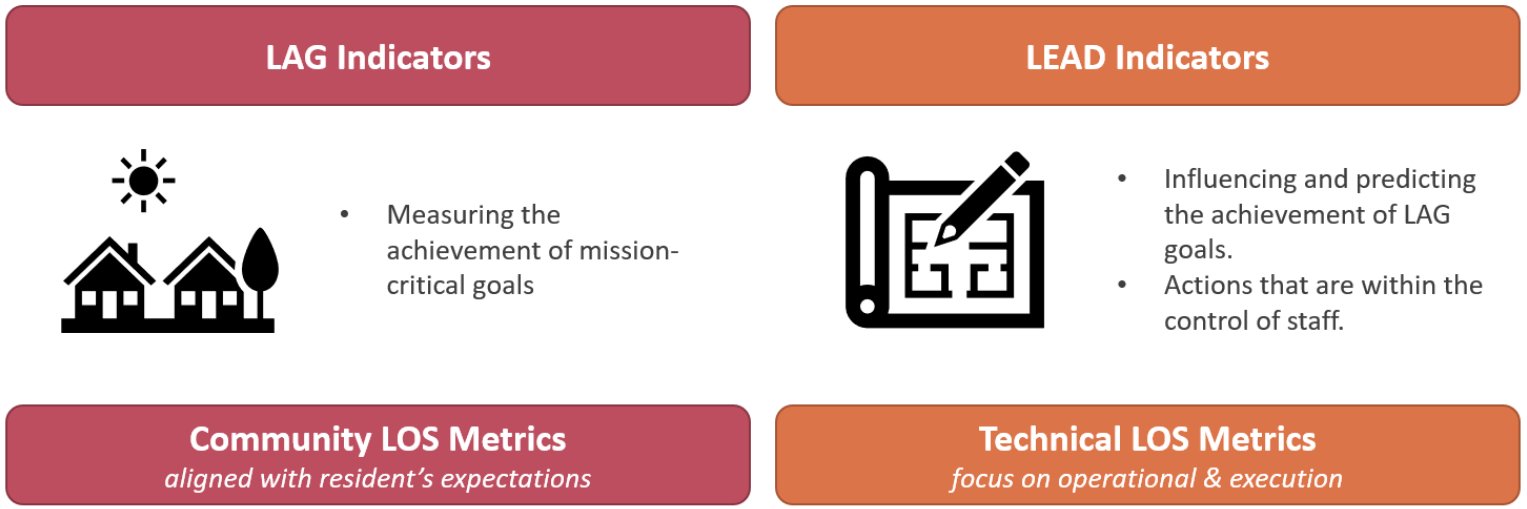
1. **Service Objective Statement**: The key corporate performance expectations are based upon core values.
2. **Service Attribute:** This summarizes the type of service being provided to citizens, businesses and the wider community, with a related **Service Expectation**, where:
    - **Scope:** describes the range and extent of the services provided.
    - **Quality:** the condition or performance of the service delivered.
    - **Reliability:** the consistency and dependability of the service.
    - **Safety:** ensuring the assets are safe for use or reduce risk from harm.
    - **Availability:** the accessibility or up-time of the service when needed.
    - **Environmental Sustainability:** the impacts of service delivery on the environment.
3. **Performance Measures**: The measurement of asset performance from the operational perspective of delivering the service and from the community perspective of receiving the service, where:
    - A Community Performance Indicator measuring asset performance from the perspective of the community; and
    - A Technical Performance Indicator measuring asset performance from an operational perspective.
4. **Current Performance:** The current performance of the asset is quantified through the best available information within the most recent one or two years.

4.1 Current LOS

This approach to measuring service delivery performance is supported by the 4 Disciplines of Execution (4DX) framework, which provides a structure for measuring public sector service delivery performance. The 4DX framework emphasizes the use of LAG Indicators to measure the output of the asset service delivery system at the community level and LEAD Indicators to measure the interim measures required to deliver the LAG indicators.

See **Figure 4-2** for the definition of LAG indicators and LEAD indicators.

Figure 4-2: Definition of LAG Indicators and LEAD Indicators



4.1.1 LAG Indicators

LAG Indicators measure the output of the asset service delivery system at the community level. LAG indicators measure high-level asset management results (goals or targets) that report on how the performance of the infrastructure provides serves to the Community. When establishing LAG Indicators (i.e. Community LOS), the measure should reflect resident and taxpayer expectations around asset performance.

- **LAG Measures are the Community LOS Measures:** These indicators are crucial for understanding how well the municipality is meeting the community's expectations and goals for asset performance. However, it is extremely difficult to manage desired LAG/Community LOS results without establishing corresponding LEAD measures.

4.1.2 LEAD Indicators

LEAD Indicators measure the interim measures (inputs) that are required to deliver the LAG indicators. LEAD indicators focus on activities or behaviors (execution) that predict and influence the achievement of LAG results.

- **LEAD Measures are the Technical LOS Measures:** These indicators are highly relevant to the City staff teams that have day-to-day responsibility for asset performance. LEAD measures provide actionable insights and guide the necessary steps to achieve the desired LAG outcomes.

4.1.3 How LEAD Indicators Influence LAG Goals

Each LAG/Community LOS target is supported by one or more LEAD/Technical measures that focus on the "stuff we have to do" to deliver effective asset management. The figure below illustrates the interdependence between Community LOS (LAG targets) and Technical LOS (LEAD execution enablers).

4.2 Current LOS Framework

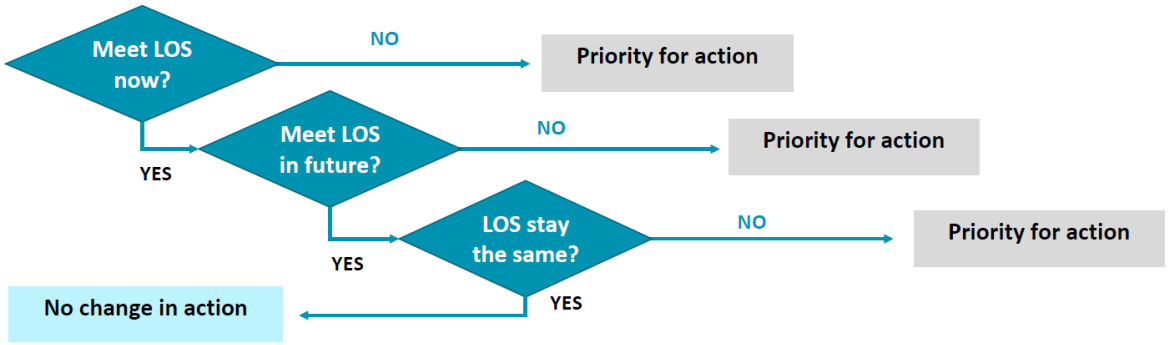
As part of the LOS Framework review for this AMP, several areas for improvement were identified and included the need to:

- **Review** previous LOS metrics for relevancy and data availability;
- **Standardize Community LOS Metrics** to better reflect resident and taxpayer expectations and present a coherent city-wide performance story;
- **Standardize Technical LOS Metrics** to align with Community LOS indicators and provide a clearer picture of asset performance from the City's organizational perspective;
- **Quantify Proposed LOS Targets** the 2021 AMP included historical performance data but did not identify future-oriented targets for both Community and Technical LOS; and
- **Commit** to continuous improvement in LOS measurement, building on the initial efforts of the 2021 plan.

Levels of Service describe the service performance and provide a framework for identifying the risks to achieving those LOS, and what actions need to be taken to balance the trade-offs between service delivery, risk and willingness to pay. A deeper discussion on risk and lifecycle strategies is provided in **Section 5.0**.

See **Figure 4-3**, which illustrates a process map for determining action priority based on meeting Levels of Service (LOS).

Figure 4-3: Decision Tree for Meeting Levels of Service



4.3 Standardized Corporate Levels of Service

At the corporate level, each of the eleven service areas reports on a set of three standardized LOS metrics, which include:

- **Reinvestment Rate**: The measure of capital renewal investment divided by the current replacement value;
- **SOGR Backlog**: The measure of the accumulated backlog of State of Good Repair treatment activities; and
- **% Poor or Very Poor**: The percentage of assets on a replacement value basis that are in poor or very poor condition.

See **Section 6.0**, for a further discussion of these metrics and the methodologies used to calculate them.

See **Table 4-1** for the current overall corporate standardized LOS Metrics for 2024.

Table 4-1: Standardized Corporate LOS Metrics – Current (2024) – Overall Corporate

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	1.08%
Technical LOS	SOGR Backlog	$454,600,000
Community LOS	% Poor or Very Poor	17.00%

4.4 Asset Service-Specific Levels of Service

In addition, asset service-specific LOS metrics were identified within the eleven asset service categories. These metrics were selected by the asset service leads as measures that either align with existing department KPIs, Master Plans or studies or drive internal reporting processes for specific goals or maintenance standards. These are reported within each of the 11 State of Local Infrastructure reports in **Appendix B**. A summary of the standardized corporate LOS metrics is presented in **Table 4-2**.

Table 4-2: Standardized Corporate LOS Metrics – Current (2024) – Each Service Area

Service Area	Reinvestment Rates (Year 1)	SOGR Backlog	% Poor or Very Poor
Transportation	0.89%	$ 335,719,000	7.83%
Stormwater	0.50%	$12,856,890	25.80%
Recreation, Community and Culture	0.79%	$12,248,018	31.04%
Urban Forestry	0.06%	$8,612,365	4.57%
Parks	2.28%	$56,490,348	30.30%
Corporate Facilities	1.17%	$1,881,293	0.19%
Transit	4.90%	$7,350,032	10.97%
Fire	2.42%	$6,523,138	16.24%
Parking	1.13%	$7,652,688	14.64%
Information Technology	3.11%	$3,754,000	9.79%
Corporate Fleet	7.11%	$1,593,100	29.72%



5.0 Asset Management Strategies and Key Considerations

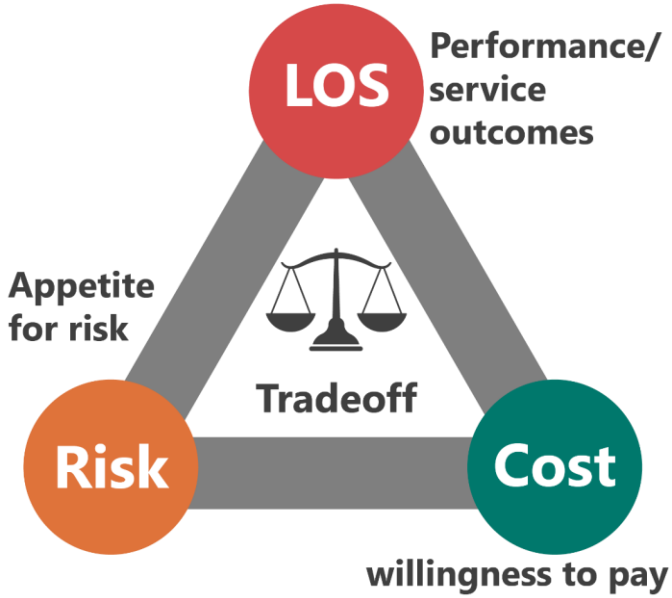
The City's asset management strategies outline how municipal infrastructure assets will be managed to deliver desired levels of service in a cost-effective and sustainable manner. These strategies will guide decision-making related to the maintenance, rehabilitation, replacement, and expansion of assets. They ensure that resources are distributed efficiently, risks are managed properly, and assets continue to support the community's needs over their lifecycle.

Each strategy considers the unique characteristics of asset classes, including their condition, criticality, performance, and financial requirements. By applying proactive, data-driven approaches, the strategies support long-term financial sustainability, regulatory compliance (such as Ontario Regulation 588/17), and alignment with the municipality's strategic objectives.

The City applies a structured method to manage its infrastructure assets to maximize value, minimize risk, and ensure sustainable service delivery over the long term. This approach is necessary, as it aims to maintain and improve asset performance, optimize spending, and meet regulatory and community expectations.

There are linkages and tradeoffs between the effort/expenditures required by the assets, the levels of service provided, and the risks related to the selected strategies. This is shown in **Figure 5-1**.

Figure 5-1: Tradeoff Between Risk, LOS and Willingness to Pay



The relationship between risk, asset performance, and willingness to pay is dynamic and interdependent. A change in one factor, such as increased risk, declining performance, or shifting financial capacity, can influence the others. This relationship is not static; it requires ongoing evaluation to ensure that service levels remain appropriate, risks are effectively managed, and investment decisions reflect both needs and available resources.

5.1 Lifecycle Management Strategy

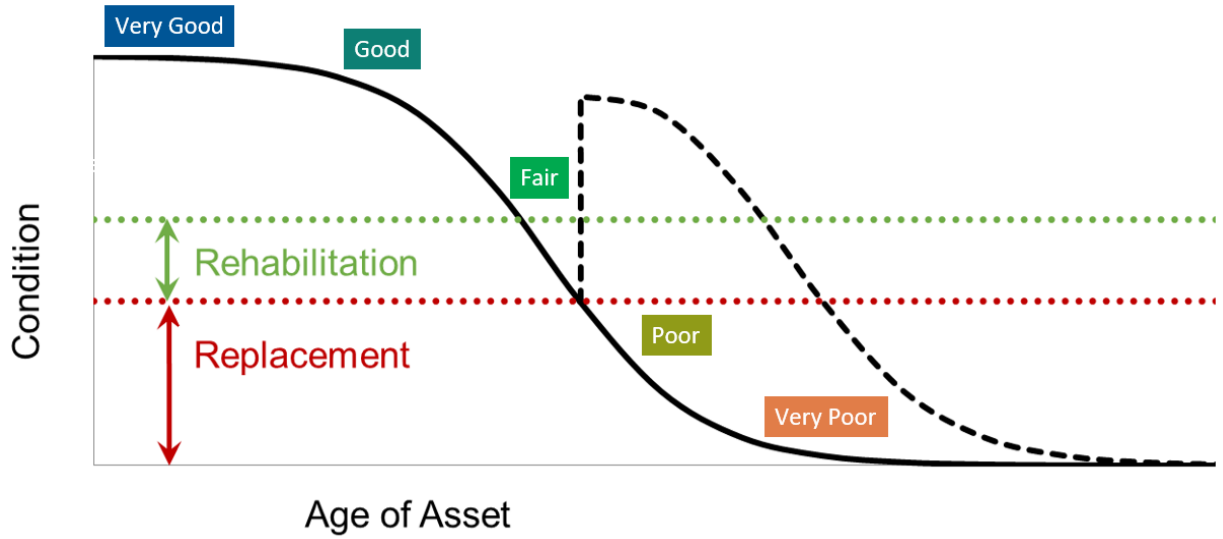
The asset lifecycle management strategy is a set of planned actions that will allow the assets to provide the proposed LOS in a sustainable way at the lowest lifecycle cost while managing risk (presented later in **Section 6.0**). It provides a comprehensive and effective approach to asset management and is shown in **Figure 5-2**. It manages and optimizes the cost and performance of an asset by considering the entire lifecycle.

In establishing proposed levels of service, it is necessary to identify the lifecycle activities that would need to be undertaken to provide the proposed levels of service. Using the EAMS-DSS tool, various lifecycle activities are employed in a modelled strategy and are informed by age, condition, or asset-specific indices such as Pavement Quality Index or Bridge Condition Index, as illustrated in **Figure 5-3**.

Figure 5-2: Asset Lifecycle Steps from Need Identification to Replacement



Figure 5-3: Lifecycle Strategy



Lifecycle activities are typically grouped into the following categories, as displayed in **Table 5-1**. Each service area State of Local Infrastructure section (**Appendix B**) also explains the associated risks with each lifecycle activity.

Table 5-1: Typical Asset Lifecycle Activities

Lifecycle Activity	Description	Examples
Non-Infrastructure	Actions or policies that can lower costs or extend asset life.	Better integrated infrastructure planning and land use planning, demand management, process optimization, and managed failures.
Construction or Acquisition	New assets are built, purchased or assumed to meet service delivery needs.	Bridge construction, road assumption, fleet vehicle purchase.

Lifecycle Activity	Description	Examples
Maintenance	Regularly scheduled inspection and maintenance, or more significant repair and activities associated with unexpected events.	Sewer spot repairs, fixing potholes.
Rehabilitation	Significant treatments are designed to extend the life of the asset.	Structural lining of sewers, road resurfacing, facility revitalization.
Replacement	Activities that are expected to occur once an asset has reached the end of its estimated. service life and renewal/ rehabilitation is no longer an option.	Sewer replacement, road reconstruction.
Disposal	Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed.	Salvage of equipment.
Expansion	Planned activities required to extend services to previously un-serviced areas - or expand services to meet growth demands.	New recreation centre to service new subdivision.

The EAMS – DSS includes in its analysis, rehabilitation, renewal, and/or replacement lifecycle strategies, with varying triggers for these lifecycle interventions depending on the asset type.

For asset needs investment analyses, the tool analyzes the asset portfolio and the various lifecycle interventions against a funding scenario with budget allocations for each asset category and forecasts how assets will degrade and be scheduled for renewal or replacement over time.

The resulting forecast summarizes the cost of annual lifecycle activities and the condition profile of the asset portfolio year over year. Different investment scenarios can be run to demonstrate the impact different investing strategies have on the state of good repair of the assets and, therefore, on their continued ability to deliver service. Refer to **Section 6.0** for different investment scenarios.

5.2 Risk Management Strategy

Effective asset management includes a risk management strategy. In the context of asset management, risk is usually described as the uncertainty of achieving the desired level of service within the asset portfolio (or service area). Risk can include exposure to unwelcome service outcomes, while risk mitigation often includes interventions such as labour and investment input. Risk exposure for each asset is assessed to prioritize the limited resources available for interventions, such as directing maintenance activities, capital investments to meet service targets, or refining service targets. Asset Risk Exposure is used to inform target investment needs required to mitigate measurable risk factors against LOS targets.

The relationship between risk and service is captured in the framing question that establishes the risk perspective: **"What is the risk of failing to deliver the intended service?"**

5.2.1 Measuring Risk

By systematically addressing the risks associated with the City's assets, the City can enhance its resilience, protect its valuable resources, and ensure the continuity of its operations. The purpose of this section is to describe how the City's risk frameworks can be used in day-to-day decision-making to prioritize resources and avoid unplanned asset failure. Risk management involves identifying and assessing potential risks and uncertainties while planning ways to avoid or mitigate risks from climate change, natural disasters, public safety threats, and aging assets. The goal is to provide a structured risk framework for understanding and addressing risks that could impact the achievement of objectives. Effective asset management incorporates these factors and the concept of infrastructure "criticality" when evaluating the effectiveness of competing alternatives. The risk exposure formula is often expressed as the product of the Likelihood of Failure (LoF) and the Consequence of Failure (CoF).

In risk management, this formula, illustrated in **Figure 5-4**, is commonly used to quantify the potential impacts of a risk event:

Risk Score = Likelihood of Failure X Consequence of Failure

Figure 5-4: Calculation of Risk Formula



5.2.2 Likelihood of Failure (LoF)

The factors that contribute to the likelihood of failure (LoF) consider reasons for asset service performance to become either unpredictable or contribute to service failure. At the level of an individual asset, the LoF factors may contribute to individual asset failure or unusual performance degradation. An example includes environmental factors such as asset exposure to flooding, contributing to accelerated performance deterioration. The likelihood measurements can include categories such as:

- **A:** Condition of the asset;
- **B**: Performance (reliability); and
- **C:** Exposure of the asset (vulnerability to climate change).

By separating condition and performance as two separate factors, there is an opportunity to consider assets in poor condition that may still be performing well, compared to those that are not performing, as well as good condition assets that may not be reliable.

The asset exposure, such as climate change, brings into consideration assets that are vulnerable to external stressors, including both the natural environment (e.g., climate change scenarios such as intense rainfall, increased temperatures, extreme weather, and drought) as well as operational exposure (e.g., increased user demand, abnormally harsh or difficult service conditions, etc.). The Exposure (climate change) rating can include any mitigation activities in the scoring which

reduces the risk and lowers the score. In consideration of these factors, it is assumed that the level of the organizing categories (A, B, and C above) is equally weighted in the determination of the likelihood of failure. It should be noted that using three independent organizing categories for collecting likelihood metrics can be considered analogous to a triple bottom line assessment for the likelihood risk axis while not meeting the ordinary understanding described in the Brundtland Commission (World Commission on Environment and Development, 1987).

5.2.3 Consequence of Failure (CoF)

The consequence of failure (CoF) methodology is a systematic approach used to assess the potential impact or consequences associated with the failure of the asset system. Similar to the LoF consideration, the system consequence can be considered at the level of impact due to individual asset failure. The objective is to understand the severity of outcomes that may result from a failure event and to inform decision-making regarding risk mitigation and management strategies through benchmarking of consequence metrics at the asset level. The triple-bottom-line is a sustainability framework that considers not only financial considerations (economic), but also social and environmental aspects. The Risk framework assesses the CoF within each of these triple-bottom-line (TBL) dimensions in a structure aligned with the conventional interpretation of TBL:

- **Economic Consequences:** Evaluate the potential economic losses associated with the failure of assets. This includes direct costs (repair or replacement of assets, loss of revenue) and indirect costs (business interruption, decreased market share). Economic consequences also consider operational disruption, which assesses the impacts on day-to-day operations and the City's ability to deliver products or services;
- **Social Consequences:** Evaluate how the failure of assets may impact people, including employees, customers, and the surrounding community. Social consequences consider factors such as safety hazards, health risks, and the well-being of individuals. It further assesses community relations and the potential damage to relationships with the community, customers, and other stakeholders; and
- **Environmental Consequences:** Consider the overall ecological impact, which includes potential harm to the environment, ecosystems, and biodiversity. Environmental consequences evaluate whether the failure could lead to violations of environmental regulations and compliance standards.

5.2.4 Risk Catalogue Development

A risk catalogue was developed with City staff based on a background review of previous risk frameworks developed in the 2021 AMP and considered data available to inform potential factors in developing both LoF and CoF scores for assets within each of the 11 asset service categories.

The catalogue primarily focuses on the CoF for the risk framework with some preliminary consideration of LoF as an outline for future improvement to risk measurement. Asset condition was identified as the primary factor for LoF scoring in this iteration of the AMP, but consideration of additional measures, as described previously, will be explored in future iterations.

The metrics, factors and scoring frameworks used to derive CoF scores varied between asset categories in some instances and were consistent in others. Data availability played the largest factor in metric definition and scoring methodologies. The decisions on scoring were made on a case-by-case basis with consideration for the impact that they have on the overall asset inventory. This decision stems from the fact that the City will be using the risk catalogue to prioritize investments within asset services and will not be used to inform budget allocation between asset services.

The risk catalogue includes both the likelihood of failure (LoF) and consequence of failure (CoF) metrics measured for each asset within the service areas.

Risk was incorporated into the City's investment needs analysis through a prioritization of capital investment needs based on the risk score of an asset.

5.2.5 Current Risk Summary

The current risk summary is presented in **Figure 5-5** for corporate risk rating by replacement value. Nearly half of the overall corporate assets are in Low-risk rating (weighted by replacement value), with 6.3% in High-risk and 0.14% in Extreme-risk which has a replacement value of $10 million. See **Figure 5-6**, which displays risk rating by replacement value for each asset service area.

Figure 5-5: Risk Rating by Replacement Value – Overall Corporate

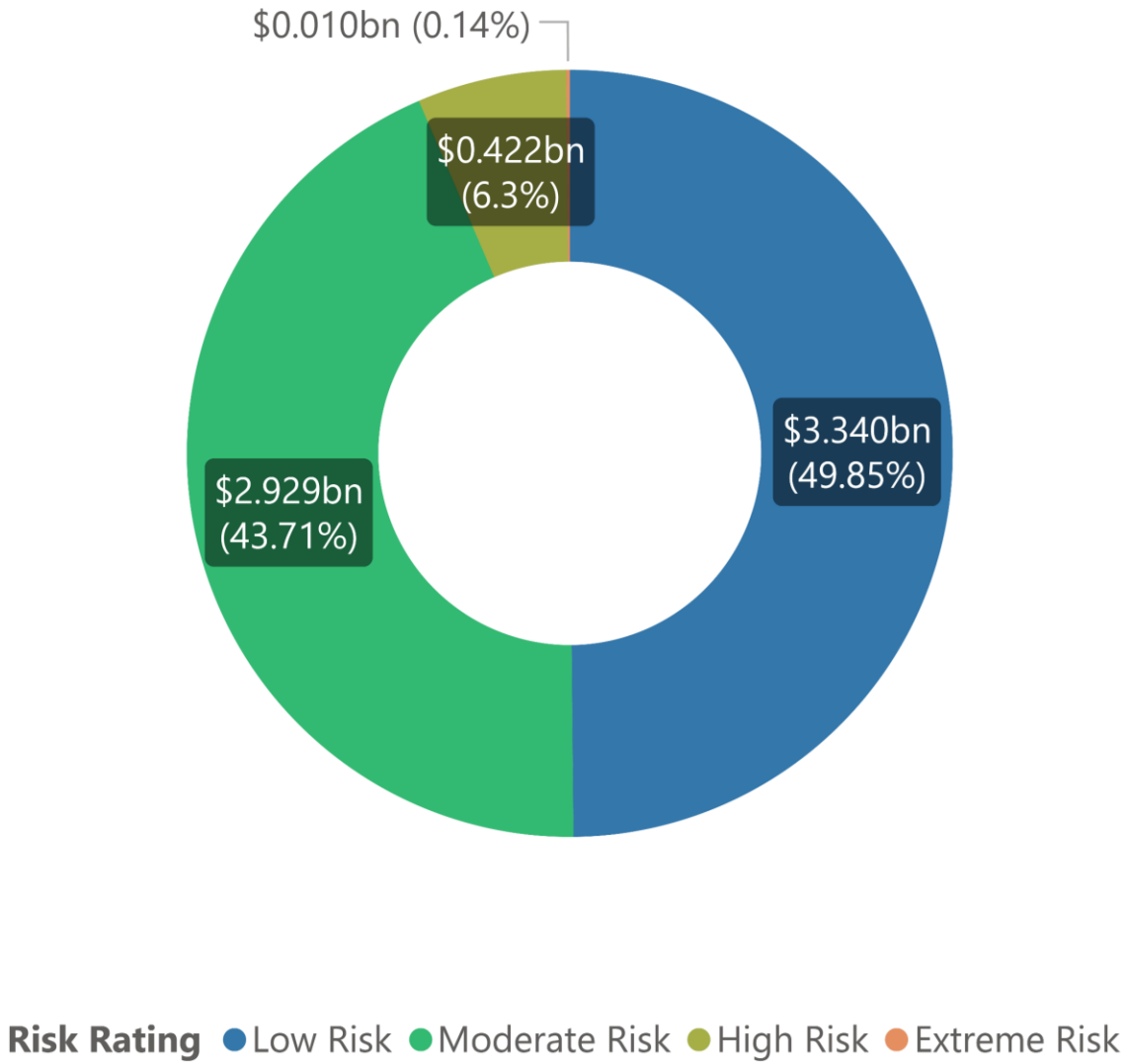
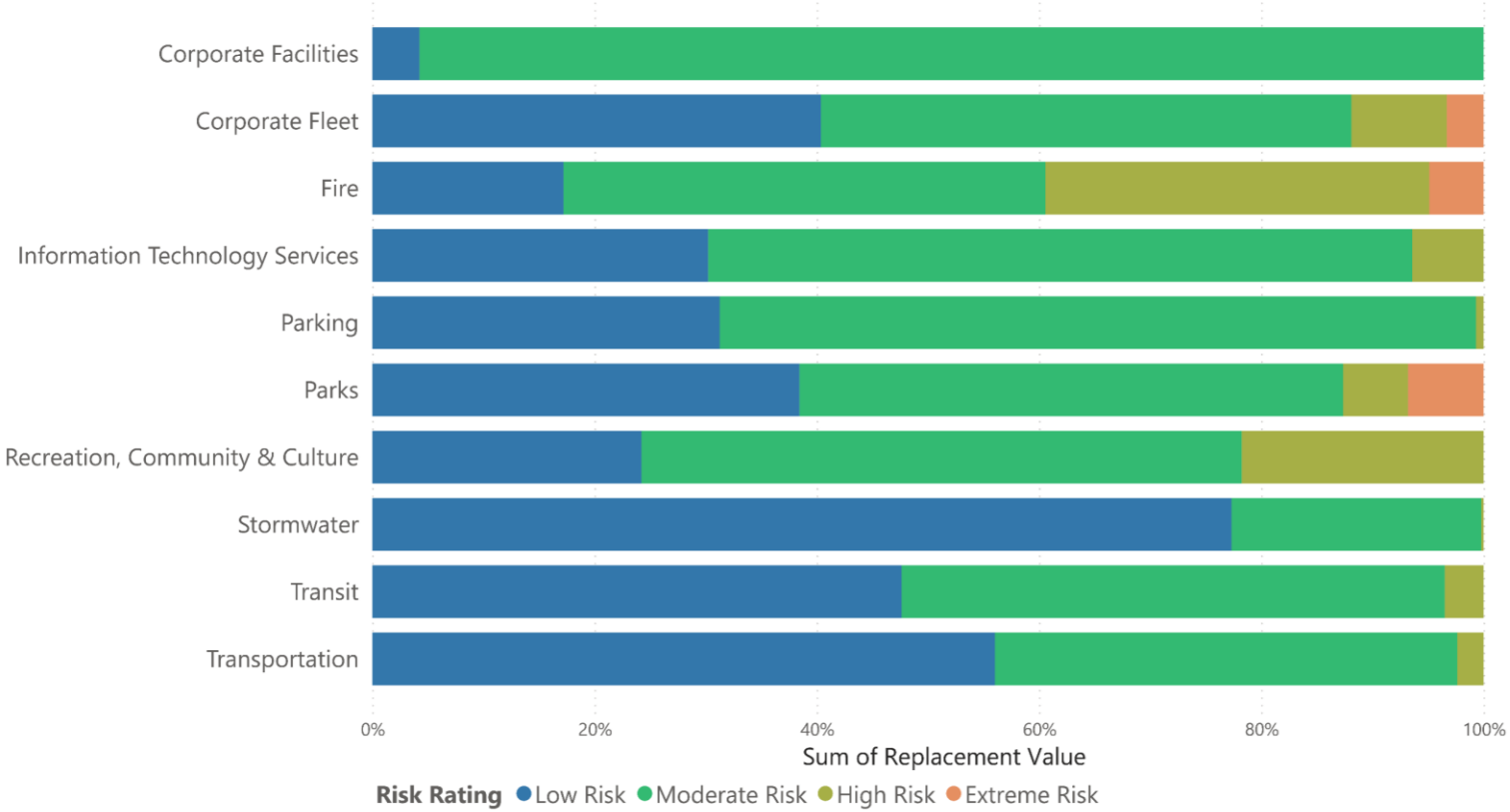


Figure 5-6 Risk Rating by Replacement Value – Service Areas



5.3 Climate Change Considerations

As a part of the City's strategic objective of being a Healthy and Greener City, the City recognizes that climate change is a significant risk that needs to be addressed. In 2019, Burlington City Council declared a Climate Emergency, highlighting the need for climate change action and directing staff to consider climate change as part of future plans and actions. Later, in 2019, a net-carbon-neutral goal for 2040 for corporate emissions was approved in the Strategic Plan, and then in 2020, a community-wide emission goal for 2050 was approved in the Climate Action Plan.

In 2021, as a key step in preparing a climate adaptation plan (Climate Resilient Burlington), staff prepared a Climate Projections report for the Council highlighting the "warmer, wetter & wilder" climate we anticipate in the future. By 2040, the City aims to achieve increased energy efficiency, protect the natural environment, and mitigate climate change impacts. This will be achieved through numerous actions and measures of success identified in the Climate Action Plan and the 2023 Green Fleet Strategy. Recognizing the need for adaptation alongside mitigation, the City approved the **Climate Resilient Burlington Plan** in July 2022. This plan addresses the impacts of a changing climate - specifically, the increasing frequency of **warmer, wetter, and wilder weather**. It identifies 32 actions across five themes: Resilient Built and Natural Infrastructure, Thriving Natural Environment, Health and Well-Being, Disaster Resilience, and Strong and Resilient Economy. The plan focuses on managing the highest projected local risks and building community resilience over the next decade.

Asset management-related actions were identified in the Climate Resilient Burlington Plan, and work completed thus far is summarized in **Table 5-2**, supporting Theme 1: Resilient Built and Natural Infrastructure.

Table 5-2: Asset Management-Related Actions in Climate Resilient Burlington Plan

Relevant Actions in Climate Resilient Burlington Plan (Theme 1)	Asset Management-Related Work Completed
Action1-1: Expand natural asset data and incorporate priority natural assets into Burlington's Asset Management Plan	City staff have begun the preparation of a Natural Assets Roadmap through a partnership with Intact Public Entities through its Natural Assets Initiative to build a high-level natural AM roadmap to start integrating natural AM considerations into overall AM practices. The project will be completed in 2025.
Action 1-2: Integrate future climate impacts in Burlington's Asset Management Plan for prioritized asset categories and assess long-term infrastructure funding requirements.	City staff from asset management, linear assets, finance, and sustainability participated in a pilot cohort with 12 municipalities across Canada with support from the Canadian Network of Asset Managers (CNAM) and a consultant to operationalize climate change in asset management policies and programs.

Within the AMP, climate change is acknowledged where possible as a potential source of risk of impacts to City infrastructure and the services they provide. Stormwater assets play a key role in adapting to the effects of extreme weather events. Understanding the long-term funding requirements for these assets and the impacts on the level of service they provide helps to support the City in managing the effects of climate change.

It is worth noting that while most of the infrastructure included in this AMP is considered 'grey,' i.e., built or engineered structures and networks such as roads, sewers, and facilities, some green infrastructure assets have been included. These include stormwater management ponds, oil & grit separators, a rain garden, creek infrastructure including erosion control features and the urban forest. These green assets help protect our natural environment by mimicking the natural hydrologic cycle and providing additional stormwater control, filtration, and infiltration. Lessons and information gained from the Grindstone Creek Municipal Natural Asset Initiative (MNAI) pilot project in partnership with Conservation Halton will further enhance how the City continues to build green infrastructure into its Asset Management Program.

5.4 Growth

As the City expands, its growth will impact existing service levels and assets. It is crucial to understand how the City's growth plans will affect the existing assets, be it positively or negatively. By evaluating the effects of this growth, the City can proactively strategize and align its asset management of existing infrastructure with future plans to support growth.

Although asset management focuses on how to manage existing infrastructure, O. Reg. 588/17 requires consideration of increases in demand caused by population and employment growth, including estimated capital expenditures and significant operating costs related to new construction or to upgrading of existing municipal infrastructure assets. See the excerpt from the regulation (Section 6.(1) 6.) in the text box.

For the review of growth, there have been some growth-related assumptions and potential impacts on the lifecycle of the assets, as shown in
Table 5-3.

> For municipalities with a population of 25,000 or more, as reported by Statistics Canada in the most recent official census,
>
> i. the estimated capital expenditures and significant operating costs to achieve the proposed levels of service as described in paragraph 1 in order to accommodate projected increases in demand caused by population and employment growth, as set out in the forecasts or assumptions referred to in paragraph 6 of subsection 5 (2), including estimated capital expenditures and significant operating costs related to new construction or to upgrading of existing municipal infrastructure assets.

Table 5-3: Growth-Related Assumptions and Potential Impact to Lifecycle

Service Area	Growth Impact Assumptions	How Assumptions Relate to the Lifecycle of the Assets
Transportation	Increased traffic and a greater demand for transportation services (operations and capacity). Continued growth is expected to lead to further development.	Anticipated increases in road maintenance costs and capital expenditures for new roads. Operational costs for network collection and expansion may also rise.
Stormwater	Increased service demands and an expansion of the stormwater network. Urbanization is expected to lead to increased storm volumes.	Potential increase in capital plan budget due to increase in service network size and capacity.
Recreation, Community, and Culture	Increased demand for services, potentially requiring extended operating hours or expanded capacity to meet service needs. This will also necessitate an increase in internal staffing to maintain facilities.	Potential increases in capital and maintenance costs for facilities and potential increases in operational costs to maintain assets.
Urban Forestry	Increase in service demands in operations and maintenance due to increased assets (canopy cover).	Potential increase in capital expenditures for services and maintenance.
Parks	Increased demand for park operations and maintenance due to an increased number of assets. This includes a greater need for service based on demands and increases in internal staffing to maintain amenities.	Potential increases in capital expenditures for acquiring additional assets to meet service needs and potential increased operational costs due to the increasing number of assets.
Corporate Facilities	Increased facility usage and changing service demands.	Anticipated increases in capital expenditure for facility development in response to growth, and higher

Service Area	Growth Impact Assumptions	How Assumptions Relate to the Lifecycle of the Assets
		operating costs for facility services and maintenance.
Transit	Increased demand for transit services, potentially requiring extended operating hours or expanded capacity over greater distances. This will also necessitate an increase in internal staffing to maintain equipment.	Potential increases in capital expenditures for acquiring additional transit assets and higher operational costs for maintaining the fleet.
Fire	Increased service demands requiring expanded operations or capacity over greater distances. This will also necessitate increases in internal staffing to maintain equipment.	Potential increases in capital expenditures for acquiring additional assets and facilities to meet service needs and potential increases in operational costs to maintain equipment and fleet assets.
Parking	Increased demand for parking services, requiring a greater number of assets to ensure reliable service and support growth. This includes the need for additional lots or structures to serve a growing community.	Potential increases in capital costs to address the need for more assets, and higher operational costs due to an increase in the overall parking network size.
Information Technology	Increased demand for IT services, impacting operations or service capacity. A higher risk of cybersecurity is also anticipated due to the increased number of assets required to provide service.	Potential increased operational costs due to an increase in the network size.
Corporate Fleet	Increased demand for fleet services, potentially requiring extended operating hours or expanded capacity over greater distances. This will also necessitate increases in internal staffing to maintain equipment.	Potential increases in capital expenditures for acquiring additional assets to meet service needs and potential increases in operational costs to maintain fleet assets.

5.4.1 Growth Framework

Master plans and studies completed by the City will continue to incorporate any growth forecasts and, where possible, any associated infrastructure needs and financial implications.

It is important to note that Council-approved planning documents do not infer that funding has been secured for the growth projects, which can only be confirmed once the growth projects are approved within the City's budgets.

5.4.1.1 Baseline

The baseline for growth predictions for the lifecycle costs analysis relies heavily on the approved or endorsed master plans developed in anticipation of the various growth impacts (as summarized in **Table 5-3**). The outcome of master planning processes includes the outline of proposed projects for adapting to growth, including specific asset investments that will result in an increase in the overall asset value held by the City. The considerations for growth were adapted from these master plans, including:

- Strategic Plan (2015-2040, Updated May 2021);
- 2024 Multi-Year Community Investment Plan (MYCIP);
- 2024 Live and Play Plan (LPP) report;
- 2024 Urban Forestry Master Plan;
- 2023 Integrated Mobility Plan (IMP);
- 2023 Parks Provisioning Master Plan (PPMP);
- 2022 Fire Master Plan; and
- Transit 5-Year Business Plan (2020-2024).

The 2024 Development Charges Background Study (DC Study) for the City of Burlington by Watson and Associates captures most of the identified asset investments that will result in projected increases in the total replacement value of assets held by the City. Most growth projects were derived from the DC Study report; however, it is pertinent to note a

slight difference between the service areas in the study and the asset hierarchy under consideration. Specifically, the DC Study encompasses Services Related to a Highway, Stormwater Drainage Services, Fire Protection Services, Parks and Recreation Services, Library Services, and Transit Services. The main effort was required to differentiate between a Parks related project or a Recreation, Community, and Culture project correlating to the asset hierarchy.

The Strategic Plan (2015-2040) identifies growth projects related to several service areas. Extracted from the Urban Forestry Master Plan includes an intention to provide a percent of growth over a period of time. These metrics were converted to a capital value over the same period for the purpose of estimating the asset inventory value increase for growth-related lifecycle costs.

The City's MYCIP (2025-2034), updated in 2024, outlines potential growth-related capital investments totalling $651 million over the 10-year planning period. The MYCIP consolidates projects from various strategic documents, including the Bateman Adaptive Re-Use, Integrated Mobility Plan, Parks Provisioning Plan, MTSA Future Development, Cumberland Expansion Plan, Fire Master Plan, and Land Planning initiatives.

Through correlation and comparison with the DC Study, all projects related to the Bateman Adaptive Re-Use, Parks Provision Plan, MTSA Future Development, and Cumberland Expansion Plan were included as they represent increases in the asset replacement value. Additionally, four specific projects from the Fire Master Plan that were not part of the DC Study were incorporated. Land acquisitions are not funded through the Infrastructure Renewal Reserve Fund and are therefore not considered further for growth-related asset lifecycle cost analysis. The total capital investment and its timeframe may have implications for the City's capital reserve fund and will be noted in the financial assessment.

The 2024 LPP outlines recommended projects for all parks and recreation assets. It is important to note that most of these projects involve retaining consultants for studies and designs rather than direct capital investment in the asset lifecycle. Consequently, a total of thirteen projects within the LPP report were identified as being directly associated with new or expanded assets. Furthermore, the LPP report categorizes these asset-related growth projects as either short-term (2024-2034) or medium-term (2024-2041).

5.4.2 Growth Projections

Future costing for growth projects was based directly on all projects identified. To maintain a conservative financial outlook, the highest estimated cost (gross capital expenditure) for each project, as detailed in all reports, was used for all projections. Notably, all cost estimates within the LPP report were presented as ranges, and to ensure a conservative financial approach, the upper limit of each range has been adopted. Project start years were aligned based on the timeline projects were initially planned. All projects planned before 2026 were scheduled to begin in 2026; short-term LPP projects were assigned a 2026 start, and short-medium-term LPP projects a 2030 start.

For projects originating from the DC Study that included a range of potential implementation years, the associated costs were strategically staggered to start at various years across the various ranges. This approach aimed to distribute the fiscal impact of these projects more evenly over the projection period, preventing large fluctuations in annual expenditure and promoting a more consistent level of capital investment in the forecast.

These projects represent a cumulative increase in the held asset value in many of the asset services, as summarized in **Table A-4-1** (Appendix A). The background documents did not identify asset acquisition or increases in held value for several asset services, including corporate facilities, parking, information technology services, or corporate fleet. Consequently, the projected lifecycle obligations for these asset services are omitted in the lifecycle costs analysis of the operating forecast metric (**Section 5.4.3.2**) and the capital forecast metric (**Section 5.4.3.3**).

5.4.3 Lifecycle

5.4.3.1 Methodology for Lifecycle Forecast Metric

This section outlines the methodologies employed to determine the Percentage of Capital Replacement Value per annum (%CRV/a) for both operating and capital costs. Understanding these metrics is fundamental to assessing the annual financial requirements relative to the capital replacement value of the asset services. The subsequent subsection details the systematic approach undertaken for each cost category. The capital replacement cost was used for both the operating

and capital costs analysis. The total capital replacement cost of the asset services was established by combining the budget categories and their respective replacement values. **Table 5-4** represents the 2024 Q4 Capital Replacement Value, serving as the baseline for both analyses.

Table 5-4: 2024 Capital Replacement Value

Service Area	Replacement Value (2024)
Transportation	$2,726,131,000
Stormwater	$1,488,941,000
Recreation, Community and Culture	$1,151,483,000
Urban Forestry	$430,618,000
Parks	$403,808,000
Corporate Facilities	$252,083,000
Transit	$246,146,000
Fire	$160,392,000
Parking	$148,037,000
Information Technology	$88,826,000
Corporate Fleet	$51,915,000

5.4.3.2 Operating Expenditures Costs

The determination of the %CRV/a for operating costs involved a systematic approach to accurately reflect the annual operating costs relative to the capital replacement value of the asset services. This methodology is outlined below:

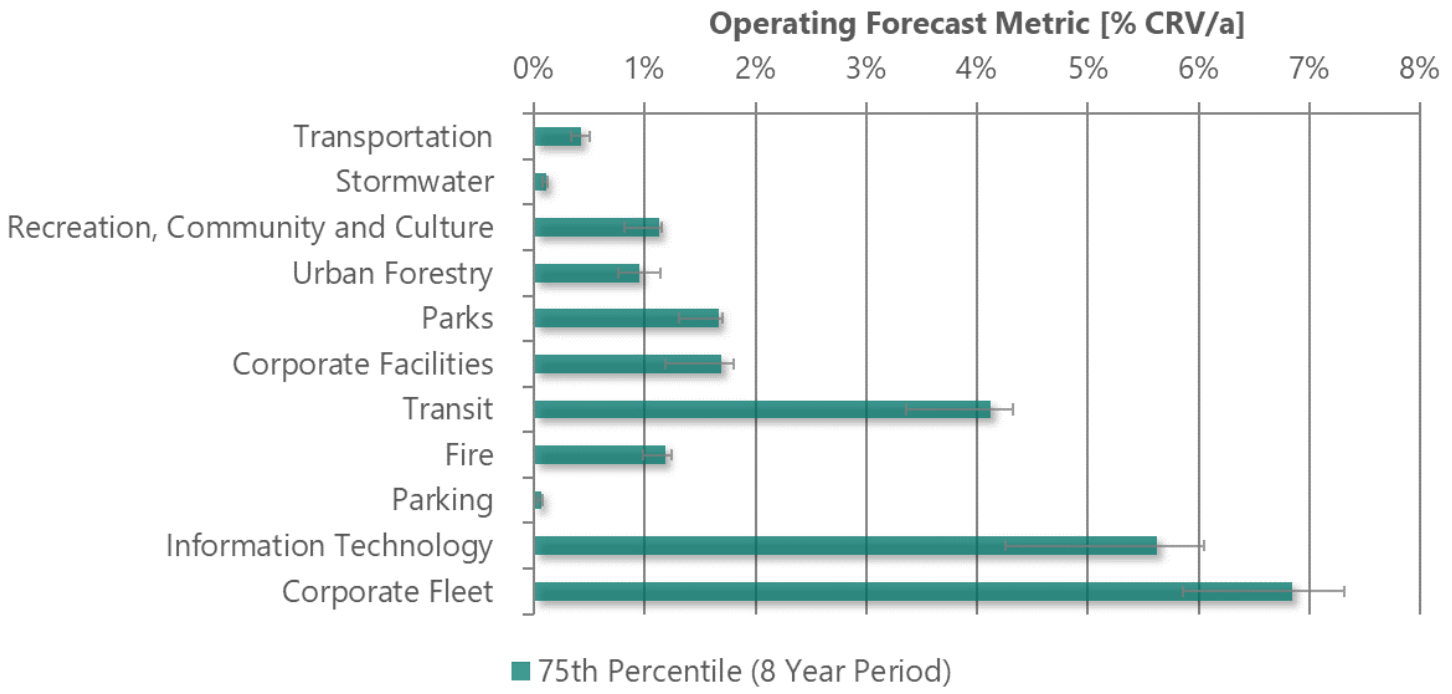
- **Operating Cost Data Collection:** Operating summaries for the period 2016-2023 were utilized. These summaries were carefully aligned with the asset services corresponding to the capital costs.
- **Deflation Adjustments:** To accurately calculate the %CRV/a, it was essential to account for inflation and deflation for the 2016-2023 period. Using the Statistic Canada Table for Building Construction Price Indexes, Percent Change,

and Quarterly for Non-residential buildings, the 2024 Q4 Capital Replacement Cost was adjusted to reflect the equivalent costs in prior years. Given that the provided costs were assumed to represent 2024 Q4 values, and the baseline for the price indexes was 2023, the Q3 price index for each respective year from 2016 to 2023 was used to deflate the operating costs. This approach was chosen to provide a conservative estimate, reflecting the higher end of average price fluctuations.

- **%CRV/a Calculation:** With the historic operating costs accurately deflated to their respective year values and the known operating costs for each year, the %CRV/a was calculated. The %CRV/a for each year was determined by dividing the annual operating costs by the corresponding year's deflated capital replacement cost, then multiplied by 100 to get a percentage.

This methodology ensures that the %CRV/a reflects the true relationship between annual operating expenditures and the adjusted capital replacement value, providing a reliable basis for asset management and financial planning. **Figure 5-7** represents the 75th percentile per service area for years from 2016-2023.

Figure 5-7: Operating Forecast Metric (by Service Area)



5.4.3.3 Capital Forecast Metric

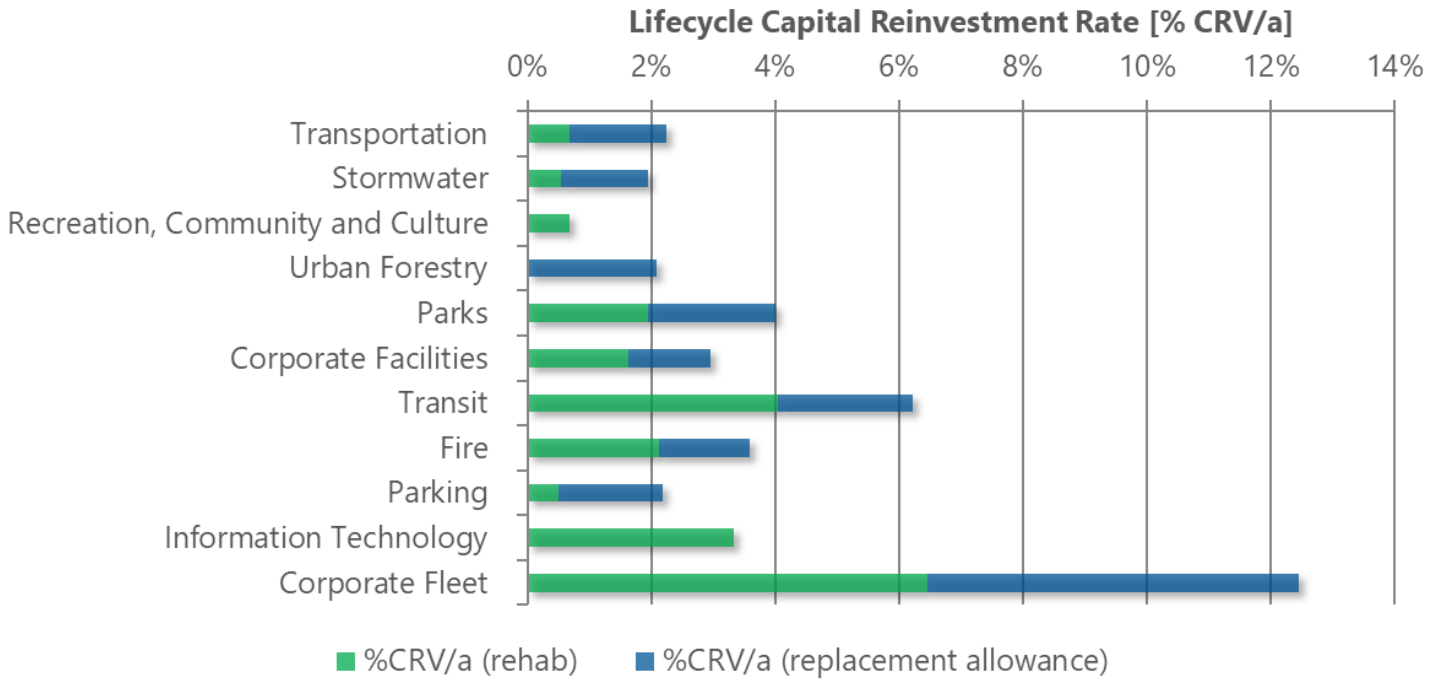
The determination of the %CRV/a for lifecycle capital expenditures involved a modified approach building upon the methodology established for operating expenditures. This adaptation aimed to accurately reflect the annual capital investment needs, encompassing both replacement and rehabilitation activities, relative to the capital replacement value of the asset services. The detailed methodology is outlined below:

- **Capital Expenditure Budget Data Collection (2023-2025):** Capital expenditure budget summaries for the period 2023-2025 were utilized. These budgets included anticipated costs for both asset rehabilitation and replacement projects for infrastructure renewal. These budget figures were carefully aligned with the corresponding asset services identified in the capital replacement cost baseline.
- **Deflation Adjustments:** To ensure comparability with the 2024 Q4 Capital Replacement Cost baseline, the budgeted capital expenditure costs for 2023 were adjusted for inflation/deflation. This adjustment utilized the same methodology as outlined in the OpEx methodology above, employing the Statistic Canada Table for Building Construction Price Indexes, Percent Change, Quarterly for Non-residential buildings and the Q3 price index for 2023 relative to the 2023 baseline. The 2024 and 2025 budget figures were in near-current dollars and were not deflated.
- **Determination of %CRV/a for Rehabilitation:** Recognizing that the capital expenditure budget includes both replacement and rehabilitation costs, a 75th percentile approach was applied to the calculated %CRV/a to represent the rehabilitation component. This statistical measure was chosen to capture a sizable portion of the planned rehabilitation activities within the overall capital expenditure budget. The annual %CRV/a representing rehabilitation was calculated by dividing the annual budgeted capital expenditure (deflated for 2023) by the corresponding year's capital replacement cost baseline and then identifying the 75th percentile across the 2023-2025 period for each asset service.
- **Calculation of %CRV/a Replacement Allowance:** The annual replacement allowance was determined by dividing the Capital Replacement Value for each asset service by its average expected useful life. This calculation provides an annualized estimate of the capital required for the eventual replacement of the asset.

- **Determination of %CRV/a Lifecycle CapEx Costs:** The %CRV/a for lifecycle capital expenditure costs was calculated by summing the %CRV/a for rehabilitation and the %CRV/a replacement allowance for each asset service.

This methodology provides a comprehensive understanding of the annual capital investment required to sustain asset services over their lifecycle, encompassing both proactive rehabilitation efforts and eventual replacement needs relative to their capital replacement value. The utilization of the 75th percentile for rehabilitation provides a robust estimate of these essential capital expenditures. **Figure 5-8** represents the overall lifecycle capital cost forecast metric, including both rehabilitation and asset replacement allowance. The asset replacement allowance is based on an allowance for replacing the asset value over the weighted average service life. The reinvestment rate calculation for portfolio replacement allowance is treated in more detail in **Section 6.0**.

Figure 5-8: Lifecycle Capital Cost Expenditure Forecast Metric (by Service Area)



5.4.4 Lifecycle Forecast Metrics

The acquisition of new assets follows population growth demands. These growth-related projects—often identified through master plans, secondary plans, and official community plans—are summarized in planning documents in which the asset is identified with the acquisition year (or window) and a cost as described previously. The acquisitions are captured year-over-year as a cumulative increase in the asset service capital replacement value (CRV) over the present baseline value. These growth asset costs then served as a basis for calculating the future Operating Expenditure (OpEx) and Capital Expenditure (CapEx) lifecycle costs. This calculation was performed by applying the determined %CRV/a to the

projected growth project costs, providing an estimate of the ongoing financial implication of these new assets. The capital and operational expenditures forecast metrics are summarized in **Table 5-5** for each service area.

Table 5-5: Capital and Operational Expenditures Forecast Metric

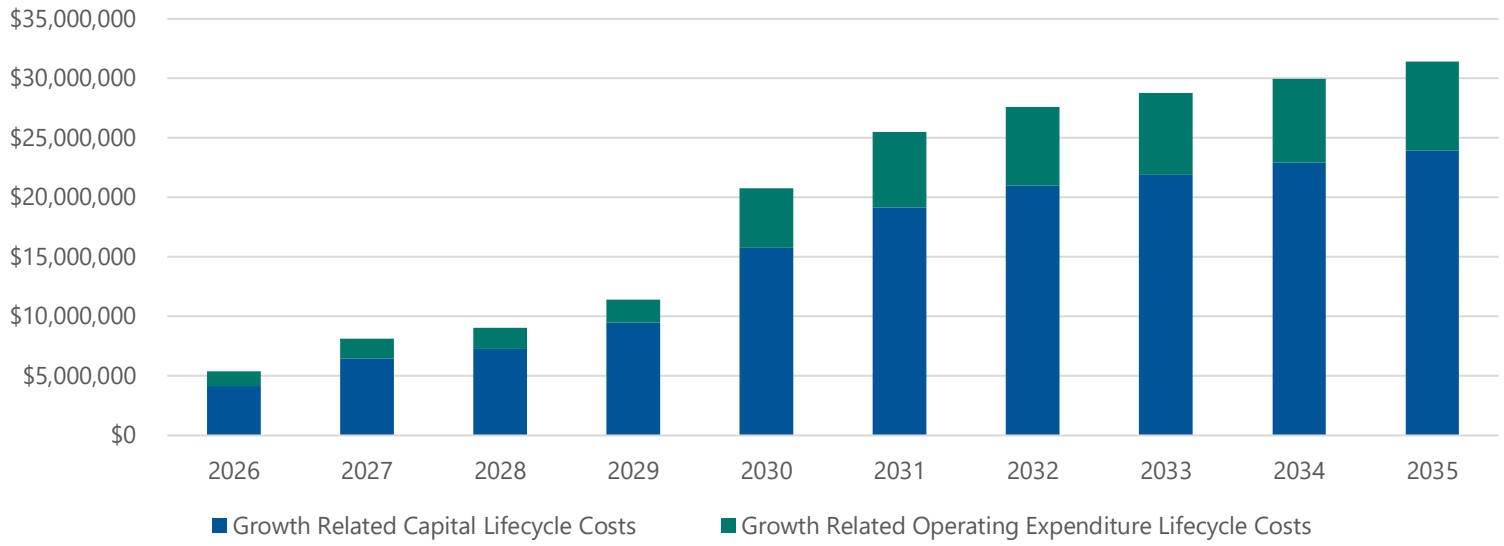
Service Area	Operating %CRV/a	Capital %CRV/a
Transportation	0.42%	2.25%
Stormwater	0.11%	1.94%
Recreation, Community and Culture	1.13%	1.88%
Urban Forestry	0.95%	2.07%
Parks	1.67%	4.01%
Corporate Facilities	1.69%	2.96%
Transit	4.12%	6.22%
Fire	1.19%	3.59%
Parking	0.07%	2.17%
Information Technology	5.62%	13.35%
Corporate Fleet	6.84%	12.44%

A summary of the cumulative CRV increase for each service area, based on background document review, is provided in **Table A-4-1** (Appendix A). This is followed by the corresponding operating and capital lifecycle cost allowances related to these growth-related asset acquisitions in **Table A-4-2** and **Table A-4-3,** respectively. The affordability of the growth accommodation through new asset acquisition and related operating and capital expenditures should be considered as part of an ongoing integration with asset management and capital planning. The summary of the growth-related costs over the next 10-years is presented in **Table 5-6**. See **Figure 5-9** for the growth-related capital and operating lifecycle costs.

Table 5-6: Summary of Growth Related 10-Year Projections

Year	Cumulative Asset Replacement Value	Operating Expenditure Lifecycle Costs	Capital Lifecycle Costs	Total
2026	$160.1 M	$1.2 M	$4.2 M	$165.5 M
2027	$256.1 M	$1.7 M	$6.5 M	$264.3 M
2028	$299.4 M	$1.8 M	$7.3 M	$302.4 M
2029	$402.3 M	$1.9 M	$9.5 M	413.7 M
2030	$577.8 M	$5.0 M	$15.8 M	$598.5 M
2031	$674.8 M	$6.4 M	$19.2 M	$700.3 M
2032	$754.8 M	$6.6 M	$21.0 M	$782.3 M
2033	$792.9 M	$6.8 M	$21.9 M	$821.6 M
2034	$835.9 M	$7.1 M	$22.9 M	$865.8 M
2035	$883.4 M	$7.5 M	$23.9 M	$914.8 M

Figure 5-9: Growth Related Capital and Operating Lifecycle Costs (2026 to 2035)



5.4.5 Growth Planning Recommendations

Lifecycle Forecast Metric: The forecast metric used to capture growth-related lifecycle costs is based on a ratio of reinvestment measured against the asset replacement value. The % CRV/ unit rate metric is both a forecast metric used to estimate reinvestment as operating and capital, as well as a potential benchmark.

Benchmarking Outcomes: Comparison of actual expenditures year-over-year using the % CRV/a metric will provide the City with a means of measuring resource allocation into the asset service areas versus outcomes measured both as level of service delivery as well as risk. For instance, changes in % CRV/a reinvestment against asset condition profiles may provide a useful benchmark against expected versus actual performance, a means of validating predicted model outcomes in the EAMS-DSS tool, and strategic budget considerations. These considerations can be bundled into the affordability lens as it relates to both growth, as well as existing asset inventory obligations.

Incorporation of Growth into Financial Strategy: The growth-related capital and operating expenditures summarized in this section are incremental to the regular asset-lifecycle expenses. The financial strategy may include reserve funding consideration in the long term for both the existing asset obligations as well as the projected lifecycle needs for growth-related assets. Annual revision of projected growth assets can be achieved by maintaining both the forecast metric benchmark, as noted above, as well as a comprehensive list of capital purchases and divestments that will impact the asset service inventory replacement values.

Recommendation (Shift Strategy): Where the City has flexibility in when to build the growth-related infrastructure, it will continue to consider a "shift strategy" to delay the growth-related project into the future. By regularly reviewing the actual growth compared with the projected growth, the City can plan the delivery of growth-related infrastructure to match the reality of growth. As part of the shift strategy, the City can time the growth projects to align with the end-of-useful life replacement projects in a project bundle. This can save capital costs, as well as minimize construction frustration for the community.



5.5 Burlington Housing Strategy Alignment

Burlington's Housing Strategy was approved by the Council in June 2022. This strategy creates a road map and acts as a guiding document for housing needs in the City of Burlington. It will help the City to work towards meeting the housing needs of the community and move us closer to reaching our Vision for housing in Burlington.

The Housing Strategy identifies 12 recommended actions that the City and other strategic decision-makers can take to increase housing options across the City. It provides a list of priority actions, quick wins, and an implementation plan to put the Housing Strategy into action.

Recognizing how Asset Management relates to the Housing Strategy is important, as that alignment ensures that infrastructure can support current and future housing needs during a period of intensifying housing demand and affordability crises.

Future initiatives and alignment strategies for Growth and Demand Management are referenced in **Section 7.0**.



6.0 Asset Investment and Financing Strategy

The City of Burlington aims to align infrastructure investments with strategic, growth and sustainability goals, while meeting proposed Levels of Service. The asset investment and financing strategy outlines the approach the City will take to fund the lifecycle costs of its infrastructure assets required to meet the proposed LOS. This will ensure reliable service delivery through sustainable financial planning, aligned with the City's long-term AMP. An overview of the City's budget process is provided below, as a critical component of service delivery.

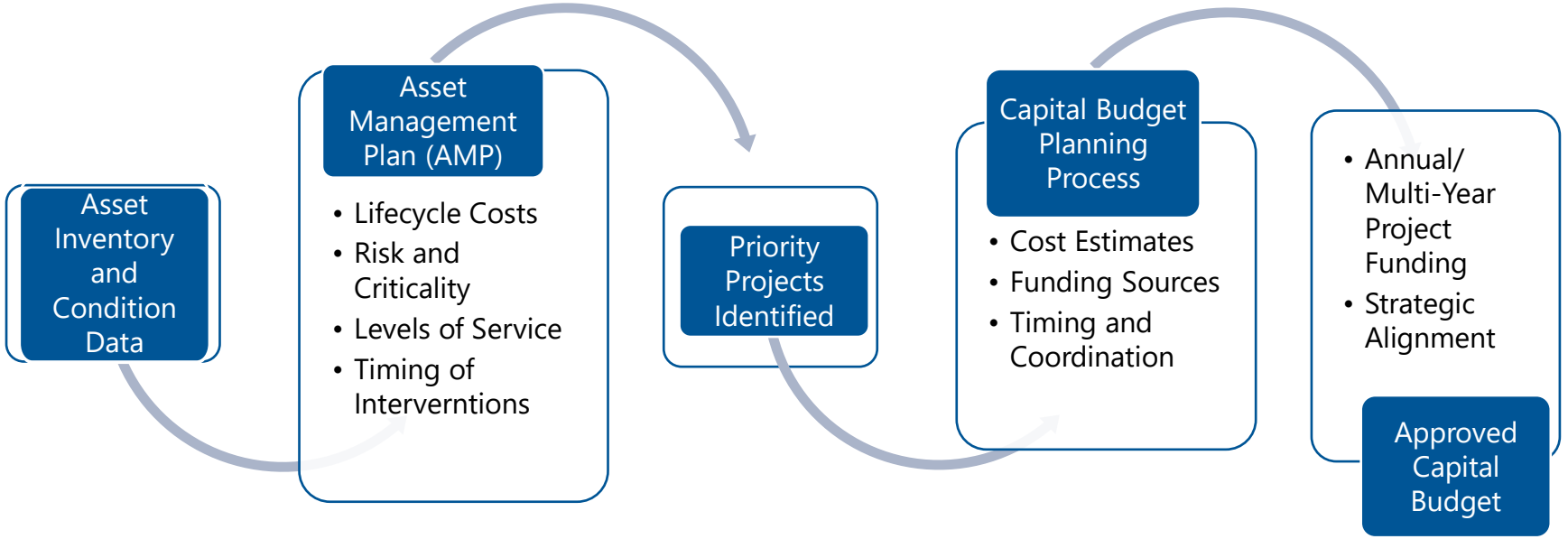
6.1 Annual Budget

The City undergoes a process to develop budgets that support essential operations and deliver the programs and services required to maintain the community's quality of life. The City's budget is established to allocate funding to construct infrastructure assets and provide services (including salaries, equipment, and materials to provide services). The budgets consider both costs (expenditures) and available funding (revenues), which are separated into two components:

1. **Operating Budget:** Used to support the day-to-day activities and functions which provide services to Burlington's citizens, and to operate and maintain the City's existing infrastructure. This includes items such as staffing, fuel, materials/supplies, and contracted services costs; and
2. **Capital Budget:** Used for the acquisition and lifecycle renewal of infrastructure assets to support services provided to the community. The Capital Budget and Forecast is a tactical financial plan that identifies investment needs and funding for infrastructure renewal, growth, and new/enhanced priorities. The budget covers a 10-year period and is reviewed annually to reassess project scope, timing, and cost, then re-prioritize when required.

The City follows a year-round annual budgeting process that leads to the development, review, and approval of the Operating and Capital Budget. The Capital Budget process (**Figure 6-1**) is supported by the EAMS-DSS analysis and is used to inform the Asset Management Plan and financial strategy.

Figure 6-1: Asset Management Informing the Capital Budget and Forecast



In 2023, the City underwent a change in its financial system. Due to the transition, the data for 2024 and 2025 operating expenditures by asset service areas were not available. Using the %CRV/a methodology for forecasting operating costs employed in the previous Growth forecast in **Section 5.0**, the 2024/2025 estimated annual operating expenditures are provided in **Table 6-1**.

Table 6-1: Historical and Estimated Operating Expenditures by Service Area

Service Area	2022 Actual	2023 Actual	2024/2025 Estimated
Transportation	$8,170,911	$8,629,951	$11,466,000
Stormwater	$984,876	$1,244,484	$4,091,000
Recreation, Community and Culture	$9,158,964	$10,104,040	$4,260,000
Urban Forestry	$3,418,830	$3,566,693	$104,000
Parks	$5,498,465	$6,043,804	$9,992,000
Corporate Facilities	$2,948,901	$4,358,541	$6,744,000
Transit	$7,357,986	$9,909,917	$1,637,000
Fire	$1,516,465	$1,510,382	$1,909,000
Parking	$51,365	$53,670	$13,012,000
Information Technology	$4,580,295	$4,467,349	$3,551,000
Corporate Fleet	$2,826,150	$3,058,407	$4,992,000
Total	**$46,513,210**	**$52,947,239**	**$61,757,000**

The capital expenditures by service area for the year 2022, 2023 and 2024 are provided in **Table 6-2**.

Table 6-2: Historical Capital Expenditures by Service Area

Note: Urban Forestry is funded through Transportation and Parks.

Service Area	2022	2023	2024
Transportation	$20,930,872	$16,606,686	$22,531,529
Stormwater	$3,350,965	$7,582,294	$6,797,817
Recreation, Community and Culture	$7,519,752	$4,039,379	$6,679,457
Urban Forestry	$0	$91,555	$29,631
Parks	$5,311,634	$6,195,948	$5,472,824
Corporate Facilities	$4,974,009	$4,339,359	$4,999,402
Transit	$4,881,055	$4,384,400	$12,390,607
Fire	$1,655,951	$2,837,050	$2,821,857
Parking	$620,000	$350,147	$250,000
Information Technology	$3,014,778	$2,635,000	$3,165,000
Corporate Fleet	$2,532,882	$3,140,808	$2,248,458
Total	**$54,791,899**	**$52,202,627**	**$67,386,581**

Table 6-3: Forecasted Capital Funding Available by Service Area

Note: Urban Forestry is funded through Transportation and Parks.

Service Area	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Transportation	$24.4 M	$25.4 M	$27.6 M	$26.3 M	$33.1 M	$31.6 M	$36.6 M	$38.8 M	$37.9 M	$37.9 M
Stormwater	$7.4 M	$6.8 M	$6.6 M	$9.8 M	$8.5 M	$13.6 M	$10.8 M	$10.3 M	$10.0 M	$8.9 M
Recreation, Community and Culture	$9.1 M	$8.3 M	$8.3 M	$9.0 M	$9.3 M	$13.6 M	$6.7 M	$10.2 M	$11.2 M	$9.2 M
Urban Forestry	$0.3 M	$0.1 M	$0.1 M	$0.3 M	$0.1 M	$0.1 M	$0.1 M	$0 M	$0 M	$0 M
Parks	$9.2 M	$7.7 M	$8.8 M	$8.9 M	$9.8 M	$9.1 M	$8.9 M	$12.3 M	$13.4 M	$13.9 M
Corporate Facilities	$2.9 M	$4.7 M	$3.8 M	$2.7 M	$0.5 M	$2.0 M	$0.7 M	$0.5 M	$2.1 M	$0.5 M
Transit	$12.1 M	$4.6 M	$6.1 M	$5.2 M	$4.2 M	$5.8 M	$6.3 M	$5.1 M	$7.1 M	$8.1 M
Fire	$3.9 M	$3.6 M	$4.0 M	$5.8 M	$4.9 M	$5.2 M	$2.7 M	$7.1 M	$6.6 M	$17.6 M
Parking	$1.7 M	$1.2 M	$1.7 M	$0.9 M	$0.6 M	$2.1 M	$0.1 M	$0.1 M	$0.1 M	$0.1 M
Information Technology	$2.8 M	$4.6 M	$5.3 M	$6.1 M	$6.4 M	$7.1 M	$7.5 M	$7.7 M	$8.2 M	$9.0 M
Corporate Fleet	$3.7 M	$4.6 M	$1.6 M	$3.7 M	$5.7 M	$3.1 M	$4.1 M	$5.0 M	$4.0 M	$2.8 M
Total	**$77.5 M**	**$71.6 M**	**$74.0 M**	**$78.2 M**	**$83.0 M**	**$93.3 M**	**$84.5 M**	**$97.1 M**	**$100.6 M**	**$108.0 M**

Note: These values reflect the forecast of funding available to the capital infrastructure renewal program up to 2030. Typically, Burlington's budget is broken out by asset category, so some assumptions were made to align funding sources with the appropriate service area.

6.2 Approach to Proposed LOS

Having an understanding of forecasted funding available for capital renewal and replacement is critical in order to determine what LOS are expected in the future. Identifying the proposed future LOS requires weighing the willingness/ability to pay against the risks of not meeting service delivery expectations.

6.2.1 The "Big Table" Framework

The "Big Table" framework is the fundamental trade-off inherent in municipal decision-making regarding asset management and service delivery. This concept emphasizes the critical balance between addressing the State of Good Repair (SOGR) Backlog, which represents the accumulated deficit in asset maintenance and renewal deemed acceptable by the City, and the available capital budget allocated across various assets, reflecting prevailing affordability constraints.

Beyond direct financial investment, the "Big Table" encourages a broader consideration of strategies to mitigate service decline. This necessitates exploring alternative solutions and operational efficiencies to sustain or enhance service quality within existing financial limitations. Ultimately, effective asset management requires a continuous and thoughtful balancing act between addressing the repair backlog, managing capital budgets, and proactively seeking ways to maintain desired service levels for the community.

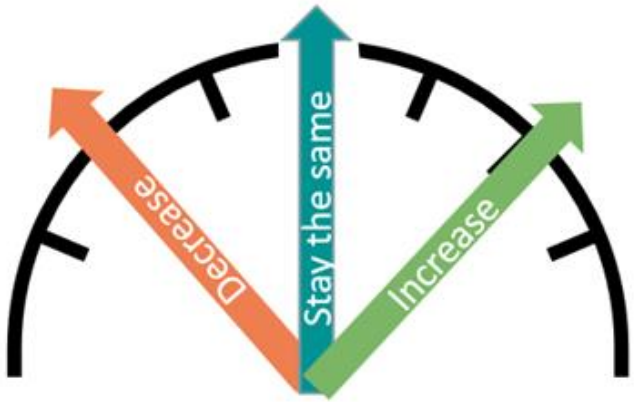
The establishment of clear proposed LOS floor targets is a critical step in operationalizing this decision-making process. By employing a standardized and concise set of LOS measurement dials across all asset service areas, the City can define the minimum acceptable levels of asset quality and reliability. These targets are not set in isolation but are directly informed by the financial affordability realities outlined in the City and Council's Asset Management Plans. Consequently, these standardized LOS floor targets provide a tangible benchmark that shapes the understanding of an acceptable state of good repair backlog within the "Big Table" Framework, ensuring that decisions regarding capital allocation are linked to maintaining essential service levels within realistic financial constraints.

6.2.2 Proposed LOS Dial

The LOS for assets is not static and can evolve over time through either intentional strategic decisions or because of operational realities. This dynamic nature means that the level at which services are delivered can be deliberated raised, maintained at its current state or may decline. Understanding the factors that influence these changes is crucial, promoting consideration of opportunities for proactive adjustments to the proposed LOS. Furthermore, it necessitates an evaluation of how different LOS targets impact financial resource requirements and the identification of potential obstacles that could hinder the desired service delivery outcomes.

The visual representation of the LOS dials in **Figure 6-2** indicates that a movement towards the right on the depicted scales signifies an increase in service levels, while a shift to the left denotes a decrease. It is critical to recognize the interdependent relationship between financial investment and LOS outcomes changes in one directly influence the other in determining the final service delivery state.

Figure 6-2: LOS Dial



6.2.3 Proposed LOS Pathways

In working sessions with the Service Areas, four proposed pathways were presented for consideration. **Figure 6-3** summarizes the four proposed pathways with their respected LOS dials, which correlate with service performance and spending requirements.

Figure 6-3: Proposed LOS Pathways



These distinct pathways identify the approach to managing and influencing the LOS of the City's assets:

Pathway 1: Maintain Current Spending and Monitor LOS: This approach involves continuing current spending levels while closely observing how key LOS metrics evolve over time. It acknowledges the inherent risk of potential LOS erosion if current spending is insufficient.

Pathway 2: Stabilize Current LOS: This pathway focuses on actively maintaining the current LOS by stabilizing key metrics. Achieving this may necessitate reallocating existing capital funds or securing additional funding to proactively address any downward trends. The primary goal is to preserve current service levels.

Pathway 3: Strategic LOS Reduction: This pathway proposes a deliberate reduction of LOS in specific asset sub-categories. This strategic move aims to address State of Good Repair deficits and/or reallocate resources to higher-priority areas, emphasizing resource optimization through a prioritization exercise.

Pathway 4: Targeted LOS Improvement: This pathway involves making strategic investments to improve LOS in specific asset sub-categories. This targeted investment is expected to result in improved key metrics, such as asset renewal ratios or regulatory non-compliance. The overarching goal is to address critical deficiencies and enhance service.

6.3 Asset Investment Needs Assessment

The City uses their EAMS-DSS tool in its asset investment needs analysis to forecast the state of the local infrastructure under various investment scenarios, as a predictor of asset service delivery.

A high-level summary of the EAMS-DSS components, process, and output is presented in **Table 6-4**.

To assess the financial implications of the various pathways and identify the proposed LOS, a "Big Table" workshop series was held with Burlington Senior Leadership members, representing the various asset service areas.

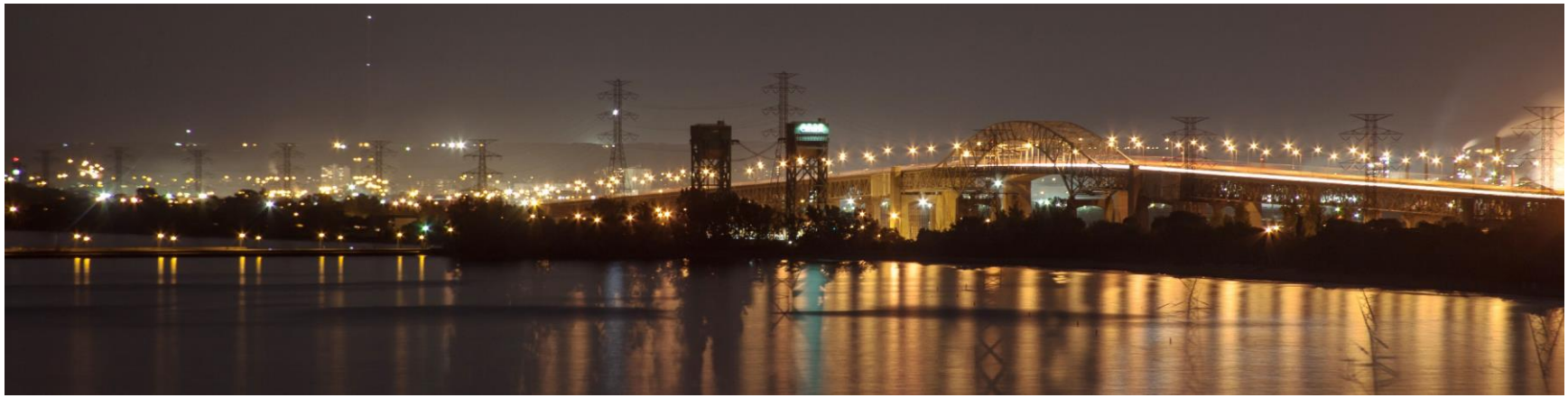


Table 6-4: High-Level Summary of the EAMS-DSS Inputs, Process and Outputs

EAMS-DSS Inputs	EAMS-DSS Process	EAMS-DSS Outputs
• Asset inventory (type, age, service life, condition, replacement value) • Lifecycle model (the cost and triggers for renewal and replacement activities, also referred to as "treatments") • Financial scenario (how much money is available per year)	• Using an optimized benefit analysis, the EAMS-DSS generates lifecycle models for assets within a service category based on need and available funding for every year of the analysis. • In any given year, assets that meet the requirements for any given renewal activity are analyzed and selected for treatment based on risk, benefit, and available funding. • In scenarios with constrained funding, assets with prescribed activities that cannot be funded are included in the backlog and remain eligible for treatment consideration in the proceeding years of the model, while continuing to degrade along the asset's degradation curve. • Assets selected for treatment in any given year are improved in condition or replaced with new ones and proceed through the rest of their lifecycle for the model to run. • When evaluating eligible treatments in a given year, the EAMS-DSS tool applies an algorithmic optimization process to select the combination of treatments that maximizes overall benefit relative to cost, using available data, treatment rules, and risk scores.	• For each model simulation, the EAMS-DSS generates year-by-year asset renewal types and costs, the resulting condition state for each asset in the model (treated and untreated), and any accumulated backlog. • By comparing scenario simulations, the projected condition profile for an asset category and class can be visualized for each year of the simulation, as well as the risk profile, total renewal costs and backlog.

It was decided to adopt standardized LOS metrics across the City's asset service areas for reporting at the corporate level. To be practical and effective, these standardized LOS metrics should be populated with financial and asset condition data that is readily available and dependable. As previously introduced in **Section 4.0**, the following three standardized LOS metrics have been selected to establish Proposed LOS targets:

1. Reinvestment Ratio (leading indicator);
2. State of Good Repair (SOGR) Backlog (leading indicator); and
3. Percentage of Assets in Condition Poor and Very Poor (lagging indicator).

The corporate standardized LOS service attributes are **Quality and Reliability** with the:

- **Technical LOS** measured by reinvestment rate (metric 1) and State of Good Repair Backlog (metric 2); and
- **Community LOS** measured by percentage of assets in Poor or Very Poor condition (metric 3).

6.3.1 Metric 1: Reinvestment Rate

The reinvestment rate serves as a leading indicator, providing a quantifiable and predictive measure of asset health over the 10-year planning horizon. It is defined as the annual capital investment divided by the current replacement value.

$$\text{Reinvestment Rate} = \frac{\text{Annual Capital Investment}}{\text{Current Replacement Value}}$$

The annual capital investment does not include growth or enhancement expenditures, and as such, can be used when quantifying the rate of investment in capital renewal.

The reinvestment rate facilitates a comparative analysis between the actual reinvestment rate and a target reinvestment rate derived from the expected asset lifespan. Deviations indicate potential under- or over-investment relative to optimal lifecycle management, with a lower actual reinvestment rate implying an extended implicit lifespan and heightened future deterioration risk.

According to the Canadian Infrastructure Report Card (2016), the reinvestment rates range from 1.0% to 3.0% depending on the type of infrastructure. A reinvestment rate of 1% yields a 100-year "implicit lifespan," but industry standards suggest a 50-year (2%) to 33-year (3%) reinvestment rate is recommended. See **Table 6-5** for reinvestment rate lower and upper limits as presented in the Canadian Infrastructure Report Card.

Table 6-5: Lower and Upper Reinvestment Rates (Reference: Canadian Infrastructure Report Card)

Infrastructure	Lower Reinvestment Limit	Upper Reinvestment Limit
Roads and Sidewalks	2.0 %	3.0%
Bridges	1.0%	1.5%
Buildings	1.7%	2.5%
Sports and Recreation	1.7%	2.5%

The current reinvestment rate for the City, based on the 2025 budget, is 1.08% or a 93-year replacement schedule. See **Table 6-6** for the current reinvestment rates per service area and the equivalent replacement years.

Table 6-6: Current Reinvestment Rates Per Service Area

Service Area	Current Replacement Value	Year 1 Current Budget	Reinvestment Rate (%)	Equivalent Replacement (years)
Transportation	$2,730,000,000	$ 24,395,300	0.89%	112
Stormwater	$1,488,441,000	$7,448,382	0.50%	200
Recreation, Community and Culture	$1,151,483,000	$9,111,784	0.79%	126
Urban Forestry	$430,618,000	$275,440	0.06%	1563
Parks	$403,808,000	$9,211,400	2.28%	44
Corporate Facilities	$252,083,000	$2,961,237	1.17%	85
Transit	$242,532,000	$12,050,644	4.90%	20
Fire	$160,392,000	$3,885,144	2.42%	41
Parking	$148,037,000	$1,675,000	1.13%	88
Information Technology	$88,826,000	$2,760,000	3.11%	32
Corporate Fleet	$51,915,000	$3,691,910	7.11%	14
Total	**$7,148,135,000**	**$77,466,241**	**1.08 %**	**93**

6.3.2 Metric 2: State of Good Repair (SOGR) Backlog

The SOGR backlog is a leading indicator that quantifies the cumulative under-investment in asset maintenance and renewal. The annual SOGR backlog is defined as:

$$\text{Annual SOGR Backlog} = \text{Target Reinvestment} - \text{Actual Reinvestment}$$

The backlog comprises of two critical components:

- **Go-Forward SOGR Backlog:** Represents the annual reinvestment deficit required to sustain the LOS within the next 10 years. Insufficient annual reinvestment relative to asset replacement value increase directly contributes to this backlog and signifies a lower LOS.
- **Accumulated SOGR Backlog:** The historic SOGR Backlog, which is the accumulated projects that have not yet been completed, reflecting the legacy of under-investment or the deferred maintenance that has accumulated to the current date.

The backlog is calculated in the EAMS-DSS analysis as the sum of the cost of treatments that were required but were not completed as scheduled in the model simulation. As assets that are eligible for treatment are funded or left untreated, the accumulated backlog is updated to reflect the cost of unfunded treatments in any given year. It is not cumulative, nor does it stack the cost of subsequent missed treatments, but reflects the current, applicable unfunded need.

Maintaining the Current LOS strategy requires investment levels that prevent or minimize any new go-forward SOGR Backlog and a substantial reduction of the accumulated backlog to prevent further decline in asset condition ratings.

The EAMS-DSS calculated the Accumulated Backlog at $454 million across all service areas, or 6.36% of the current replacement value, as the baseline for the beginning of the forecast analysis, using Q4 2024 data.

6.3.3 Metric 3: Percentage of Asset Condition in Poor or Very Poor

Asset condition rating acts as a lagging indicator, reflecting the cumulative impact of the reinvestment ratio and SOGR Backlog. Condition is categorized by the percentage of assets falling within "Poor or Very Poor" classification. It is important to note that asset condition could also report on "Fair or Better" but during the Proposed LOS Workshop and the subsequent Scenarios Workshop it was determined that the focus on the assets that need attention, i.e. Poor or Very Poor, that are at an increasing likelihood of failure, is a preferred metric for reporting at the corporate level.

See **Table 6-7** for the three standardized corporate LOS metrics. Note that the percentage of assets in Poor and Very Poor is weighted by replacement value.

Table 6-7: Standardized Corporate LOS Metrics – Current (2024)

Service Area	Reinvestment Rate	Accumulated SOGR Backlog	% Poor or Very Poor (Weighted)
Transportation	0.89%	$335,718,935	7.83%
Stormwater	0.50%	$12,856,890	25.80%
Recreation, Community and Culture	0.79%	$12,248,018	31.04%
Urban Forestry	0.06%	$8,612,365	4.57%
Parks	2.28%	$56,490,348	30.30%
Corporate Facilities	1.17%	$1,881,293	0.19%
Transit	4.90%	$7,350,032	10.97%
Fire	1.88%	$6,523,138	16.24%
Parking	1.13%	$7,652,688	14.64%
Information Technology	3.11%	$3,754,000	9.79%
Corporate Fleet	7.11%	$1,593,100	29.72%
Total	**1.08%**	**$454,600,000**	**17.00%**

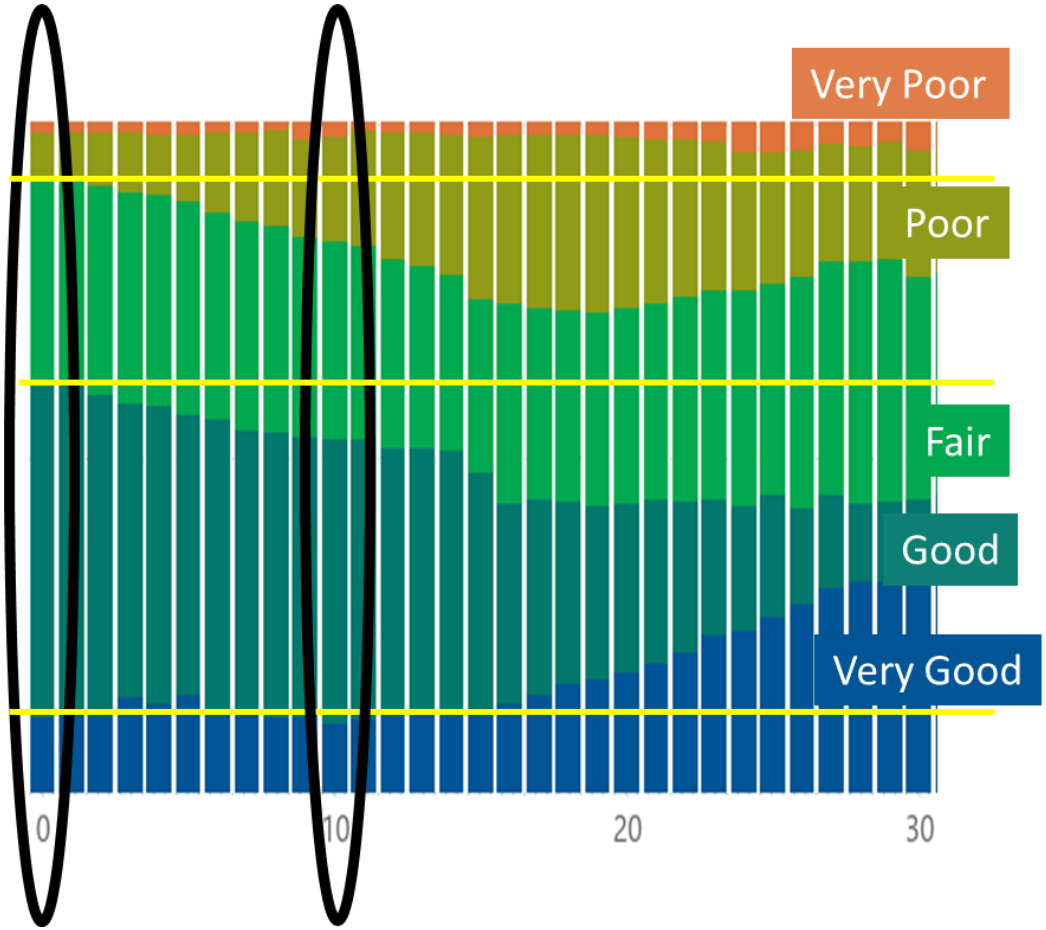
6.4 Proposed LOS Scenarios

The proposed LOS by Year 10 will be informed by the three standardized LOS metrics. Guided by the direction to follow Pathway 2, the goal is to stabilize LOS by Year 10 (within a range) at the corporate level, recognizing that many assets will be scheduled for replacement in the period beyond Year 10 and that some service areas may show a greater change in Year 10 than the corporate level. Considering the condition in the following years (Year 11 to Year 20) is also important, as the condition of the infrastructure over the long term is key to a sustainable and responsible approach to asset management.

6.4.1 Planned SOGR Investment Scenario

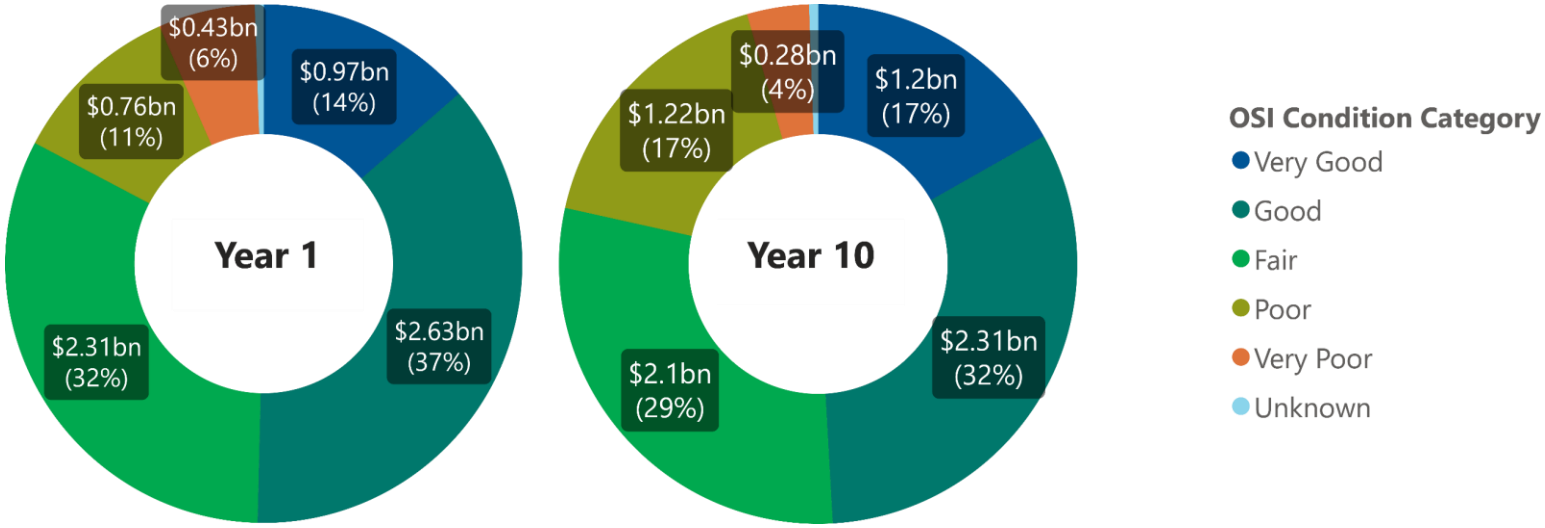
This scenario uses the current planned 10-year budget allocation for infrastructure renewal and replacement, referred to herein as the "Planned SOGR Investment". Continuing this level of capital reinvestment produced a declining condition in year 10. At the corporate level, the condition declined to 21% Poor or Very Poor (from 17% current condition) with a downward slide continuing to Year 20. See **Figure 6-4**.

Figure 6-4: Overall Condition Year 1 to Year 30 – Planned SOGR Investment



See **Figure 6-5** for a comparison of the current state with the 10-year condition under the Planned SOGR Investment Scenario with a reinvestment of $77.5 M in year 1 (a renewal rate of 1.08%),

Figure 6-5: Corporate LOS Condition (2024 and 2034) under Planned SOGR Investment Scenario



6.4.2 Optimized Scenario

The "Optimized" scenario completed all scheduled treatments and 10% of the accumulated backlog treatments each year. A true unconstrained scenario assumes the entirety of the accumulated backlog is removed in the first year of the model situation, which in a real-world situation would be unrealistic to accomplish from both a financing and human-capital resourcing perspective. Under this scenario, no new treatment backlog is created across the next 10 years. The investment required for this scenario is $1,491 million over the 10 years. See **Table 6-8** with the comparison of the Optimized Scenario with the Planned SOGR Investment Scenario.

Table 6-8 Summary of Scenarios - Planned SOGR Investment and Optimized Scenario

Scenario	Investment (Years 1 to 10)	Annual Reinvestment Rate	Year 10 Accumulated Backlog	Year 10 % Poor or Very Poor
Planned SOGR Investment	$868,514,000	1.22%	$515M	21%
Optimized	$1,419,939,000	1.99%	$0	13%

As the current LOS for condition is 17% Poor or Very Poor, the Optimized Scenario could be described as overachieving in year 10, as there is an improvement in condition to 13%. As the accumulated backlog has been fulfilled by Year 10, going forward, the required investments will level out.

6.4.3 Stabilize LOS Scenario

In a follow-up workshop, the Senior Leadership participants reviewed various data sources, including public engagement survey results, EAMS -DSS analyses for the Planned SOGR Investment and Optimized Scenarios, and the City's 2025 current budget level of renewal investment. Based on this review, the participants requested that a Stabilize LOS Scenario be developed for analysis.

The direction for the Stabilize LOS Scenario was to focus investments on Transportation, as this service area has the greatest impact on the overall corporate condition profile. Transportation represents 38% of the overall replacement value, and the projected condition in year 10 is projected erosion in condition. In the survey, the public also identified Transportation as an area for improvement.

See **Figure 6-6** and **Figure 6-7** with the overall condition Year 0 and by Year 10, highlighting the percentage of Poor and Very Poor is stabilized at 17% in the Stabilize LOS Scenario but increased to 21% in the Planned SOGR Scenario (weighted by replacement value in both scenarios).

Figure 6-6: Corporate Condition Profile (2024 to 2034) – Planned SOGR Scenario

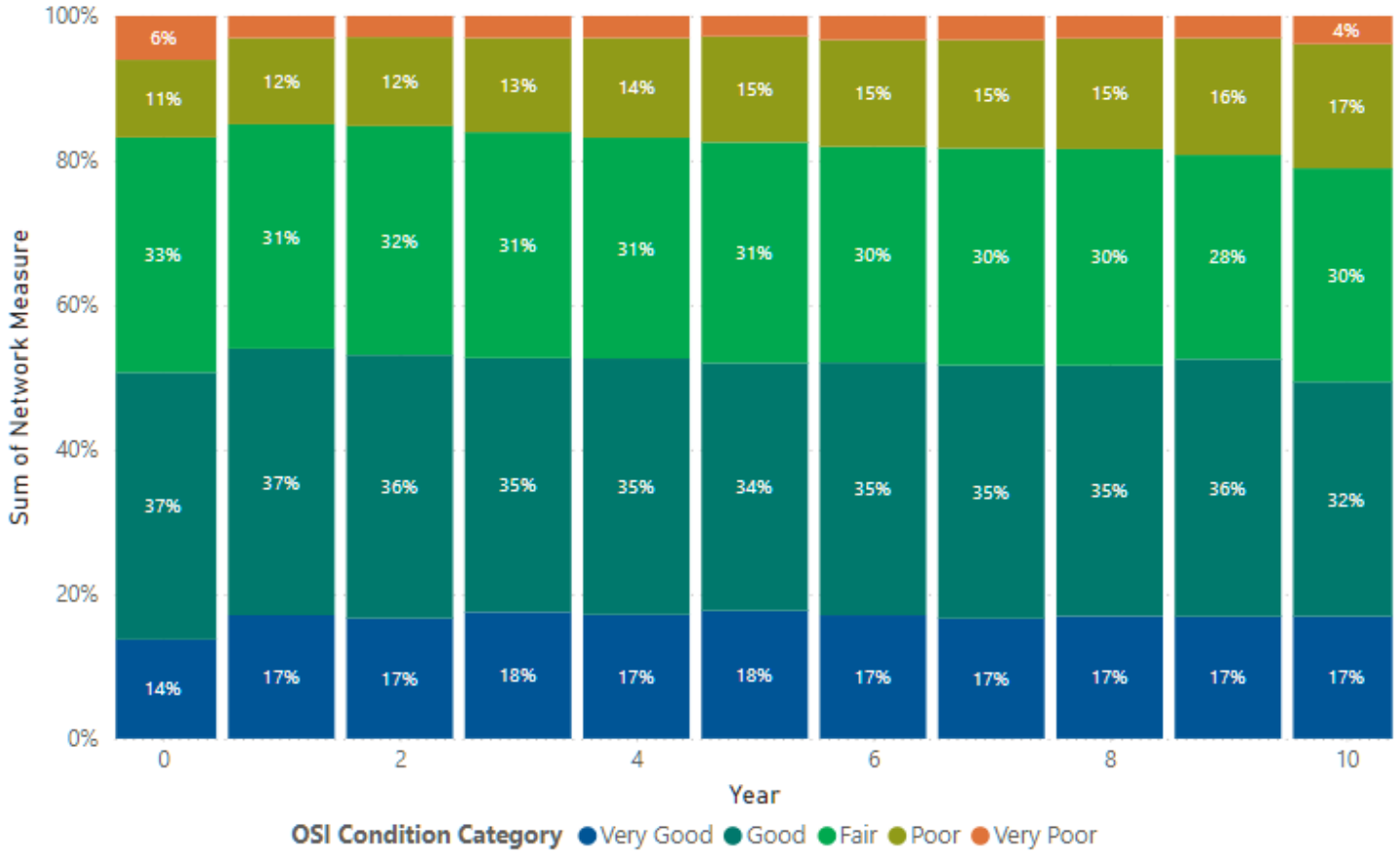


Figure 6-7: Corporate Condition Profile (2024 to 2034) – Stabilize LOS Scenario



The Stabilize LOS Scenario could not stabilize LOS across all eleven asset service areas by Year 10, but included strategic increases in Transportation, and to a lesser degree in a few other asset classes, to improve on the target reinvestment rates and achieve overall stabilization of LOS at the corporate level.

See **Table 6-9** for the summary of proposed LOS scenarios highlighting the amount of investment in the first ten years, the equivalent annual reinvestment rate, the remaining accumulated backlog in Year 10 and the condition in year 10. See **Table 6-10** for estimated operating costs per service area.

Table 6-9: Summary of Scenarios for Corporate Overall Proposed LOS

Scenario	Investment (Years 1 to 10)	Average 10-year Reinvestment Rate	Year 10 Accumulated Backlog	Year 10 % Poor or Very Poor
Planned SOGR Investment	$868,514,000	1.22%	$515,180,000	21%
Optimized	$1,419,939,000	1.99%	$0	13%
Stabilize LOS	$1,217,910,000	1.70%	$380,489,000	17%





Table 6-10: Estimated Annual Operating Costs Per Service Area

Service Area	Operating %CRV/a	Current Replacement Value	Estimated Annual Operating Costs
Transportation	0.42%	$2,730,000,000	$11,466,000
Stormwater	0.11%	$1,488,441,000	$1,637,000
Recreation, Community and Culture	1.13%	$1,151,483,000	$13,012,000
Urban Forestry	0.95%	$430,618,000	$4,091,000
Parks	1.67%	$403,808,000	$6,744,000
Corporate Facilities	1.69%	$252,083,000	$4,260,000
Transit	4.12%	$242,532,000	$9,992,000
Fire	1.19%	$160,392,000	$1,909,000
Parking	0.07%	$148,037,000	$104,000
Information Technology	5.62%	$88,826,000	$4,992,000
Corporate Fleet	6.84%	$51,915,000	$3,551,000
Total	**0.86%**	**$7,148,135,000**	**$61,757,000**

6.5 Proposed Level of Service

The objective of the scenario analysis was to develop a state of good repair plan to be phased in over 10 years that would reduce the infrastructure backlog and stabilize service levels.

The scope or parameters to select the proposed LOS include:

- Focus is only on the state of good repair needs (excludes growth and new/enhanced);
- Preferred pathway is P2 to stabilize LOS in Year 10;
- Forecast spending needs over ten years;
- Phased in annual asset investments that would stabilize overall asset condition-based levels of service in year 10 of the plan, as they are in year 1; and
- Prioritization of critical assets nearing end-of-life or requiring urgent upgrades (the % in Poor and Very Poor condition).

Because the Stabilize LOS Scenario met the conditions of stabilizing LOS over ten years, it has been selected and renamed the "**Recommended SOGR Investment Scenario**" that meets the City's Proposed LOS. Please see **Section 6.7** for the Recommended SOGR Investment Strategy with further details on this recommended scenario and the financial affordability and strategy associated with it.

See **Table 6-11** for the Proposed LOS for the Corporate Standardized LOS metrics for Years 1 – 10 under the Recommended SOGR Investment scenario. The complete table of Proposed LOS for Years 1 – 10 for each of the asset service areas is available in **Appendix A-5**.

Table 6-11: Proposed Corporate LOS for Years 1-10 – Recommended SOGR Investment Scenario

Year	Reinvestment Rate	Accumulated SOGR Backlog	% Poor or Very Poor
1-2025	1.08%	$454,680,807	16.74%
2-2026	1.00%	$399,835,877	14.72%
3-2027	1.37%	$392,890,657	15.01%
4-2028	1.41%	$372,010,242	15.56%
5-2029	1.69%	$371,522,019	16.24%
6-2030	1.62%	$359,559,555	16.88%
7-2031	1.86%	$369,613,197	17.23%
8-2032	2.03%	$348,351,959	17.02%
9-2033	2.24%	$379,253,808	16.91%
10-2034	2.72%	$380,489,447	17.40%

6.6 Financial Analysis and Reporting

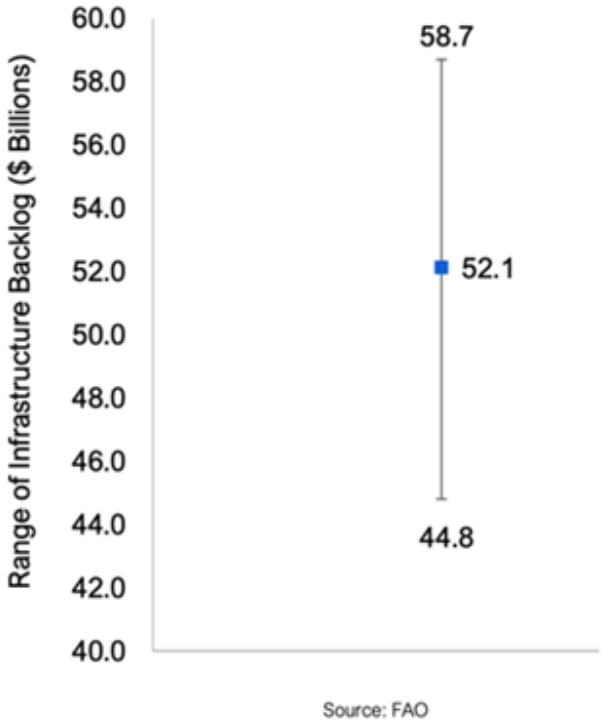
6.6.1 Confronting the Municipal Sector State of Good Repair Backlog

The Financial Accountability Office of Ontario (FAO) has undertaken important analytical work to quantify the Ontario municipal sector infrastructure backlog. See **Figure 6-8**. The FAO has established a 2020 $45B to $59B range quantifying the municipal infrastructure backlog – which they highlight using a $52B midpoint estimate. The backlog is defined as the capital spending required to bring existing assets up to a State of Good Repair. The backlog $ estimate is certainly too low since $47B worth of municipal assets across Ontario had undocumented condition ratings. The municipal infrastructure State of Good Repair backlog extends across the entire Ontario municipal sector. It is one of the main drivers behind O. Reg 588/17.

Figure 6-8: Municipal Infrastructure Backlog Estimate (Reference: FAO)

The municipal infrastructure backlog estimated at $52 billion in 2020

- The capital spending required to bring assets up to a state of good repair is defined in this report as the infrastructure backlog.
- The FAO estimates the backlog is about $52 billion dollars. However, the backlog could range from $45 to $59 billion, depending on the actual condition of assets.
- These figures do not include any repair estimates for the $47 billion of municipal assets whose condition is unknown.



6.6.2 Overview of Burlington's Analytical Framework

The financial analysis underpinning this plan employs a long-range forecasting methodology, projecting funding requirements for Burlington's diverse portfolio of municipal infrastructure assets. The core principles of this approach involve:

- **Lifecycle Cost** For each asset service (roads, stormwater, parks, buildings, and other core municipal assets), the EAMS-DSS has been used to determine the cost of ownership throughout their expected lifespan. This includes initial acquisition/construction costs, periodic rehabilitation, and eventual replacement. The models incorporate factors such as asset age, condition assessments, mid-life interventions, and maintenance and renewal cycles. Corroborating this analysis are the lifecycle capital costs estimated from optimal reinvestment rates and historical expenditures. A historic review of actual capital expenditures for rehabilitation was adapted into a metric for rehabilitation capital investments, and an estimate of replacement allowances was estimated from the asset register data using a value-weighted aggregate for each asset service. The two metrics together provide a secondary approach to the lifecycle capital costs required to meet the proposed LOS.
- **Needs Assessment:** Based on the lifecycle cost models, the analysis quantifies the annual investment required to maintain each asset category at the proposed level of service to maintain the level of service and to reduce the backlog over the period of 10 years by chipping an additional amount every year. This assessment identifies the timing and magnitude of future capital rehabilitation and replacement projects.
- **Level of Service:** The analysis and findings are based on discussions held during working sessions with asset leads from each service area. These sessions focused on assessing the impacts of distinct Levels of Service (LOS) as outlined under Ontario Regulation 588/17. While initial discussions explored the potential for service improvements (Pathway 1), the collective decision during the "Big Table" meeting was to adopt Pathway 2, which aims to stabilize the current LOS. As part of this approach, a funding analysis was conducted to identify existing shortfalls, address infrastructure backlogs, and establish a strategy to reduce the funding gap over time to ensure service sustainability.
- **Funding Availability Analysis:** The analysis compares the projected annual investment needs against currently allocated capital funding contributions. This involves reviewing existing budgetary allocations, dedicated reserve funds, and anticipated revenue streams earmarked for capital projects.

6.6.3 Financial Affordability Analysis

This section provides the financial strategy for the City of Burlington based on a 10-year capital planning approach, using detailed asset data and lifecycle-based forecasting. The following analysis provides a financial estimate of the City's State of Good Repair (SOGR) needs, as an alternative to the methodology from the EAMS-DSS model, which is driven by Level of Service (LOS) metrics and condition-based scenarios.

The following analysis uses a straight-line approach, applying weighted average estimated service life to determine reinvestment rates for each asset service area. The weighted average service life is calculated using asset replacement values, and by incorporating the past three years of historical capital expenditure (CapEx) reinvestment rates as %CRV/a along with estimated rates required to replace assets at end-of-life, a target reinvestment ratio is derived for each asset category. This ratio is then applied to the replacement cost of each service area to estimate the annual replacement cost allowance.

This approach serves as a **high-level financial benchmark** that complements the **EAMS-DSS model**, which relies on scenario-based evaluations informed by condition-based Level of Service (LOS) metrics and associated reinvestment strategies. While the figures may differ, the two methodologies offer **different but valuable perspectives**, with the straight-line approach providing a planning-level estimate aligned with the 10-year capital outlook, and the EAMS-DSS model offering more refined insights based on asset performance and risk.

6.6.4 Key Inputs and Straight-Line Analysis

The analysis is built on current replacement values (CRVs) for each asset service area and the weighted average estimated service life for each asset group. Rehabilitation reinvestment rates are based on historic rehab cost %CRV/a, and estimated service life were sourced from asset data, which helps identify the target replacement year for each service area. These values were used to determine both the de facto lifecycle replacement year—based on current investment levels—and the target reinvestment ratio, calculated as 100 divided by the service life. This approach allows the City a secondary estimate

on how much funding is required each year to both rehabilitate and replace assets, by maintaining them in a state of good repair.

6.6.5 Annual Infrastructure Reinvestment Deficit

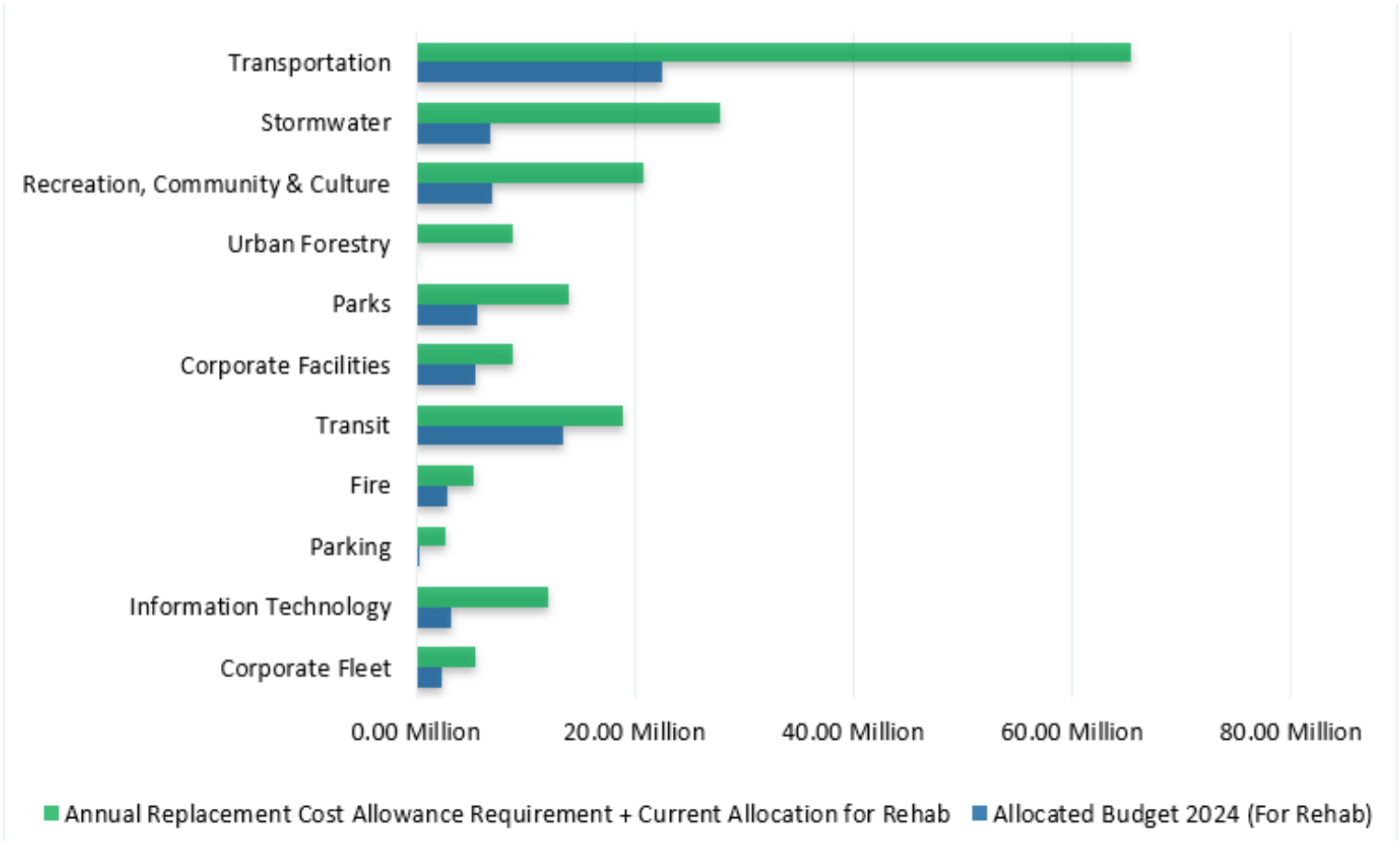
An analysis of the City's asset inventory and estimated average service life reveals the annual reinvestment requirement to maintain these assets sustainably, based on its weighted average estimated service life totals $187.0 million. However, the last three years' historical average capital expenditure at %CRV/a amounts to $66.4 million. This high-level approach to calculating the infrastructure funding gap reveals a significant annual infrastructure funding gap of $120.6 million, representing approximately 65% of the identified need not being met. Transportation and Stormwater systems have seen modest annual reinvestment rates of 0.67% and 0.53%, with actual expenditures of approximately $18.4 million and $7.86 million, respectively. These are critical core assets with large networks, where even a small percentage represents significant capital outlay. See **Table 6-12,** which presents the historic reinvestment rates as %CRV/a per service area.

Table 6-12: Historic Reinvestment as %CRV/a

Service Area	Rehab Reinvestment Rate (%CRV/a)	Current Annual Capital Expenditure (based on 3 years)
Transportation	0.67%	$18,375,000
Stormwater	0.53%	$7,863,000
Recreation, Community and Culture	0.68%	$7,781,000
Urban Forestry	0.02%	$82,000
Parks	1.97%	$7,831,000
Corporate Facilities	1.62%	$4,075,000
Transit	4.04%	$9,938,000
Fire	2.12%	$3,398,000
Parking	0.50%	$737,000
Information Technology Services	3.32%	$2,951,000
Corporate Fleet	6.45%	$3,346,000
Total	**0.93%**	**$66,379,000**

Overall, most service areas face substantial deficits, highlighting a critical need for increased funding to meet the required levels of service while allowing for eventual asset replacement over the aggregate asset service life. This funding gap methodology is based on the historical investment as %CRV/a and the total cost allowance, including the historical investment and the replacement cost allowance based on estimated service life in **Figure 6-9**.

Figure 6-9: Current Reinvestment Gap - Target Reinvestment Compared with Historical Spend

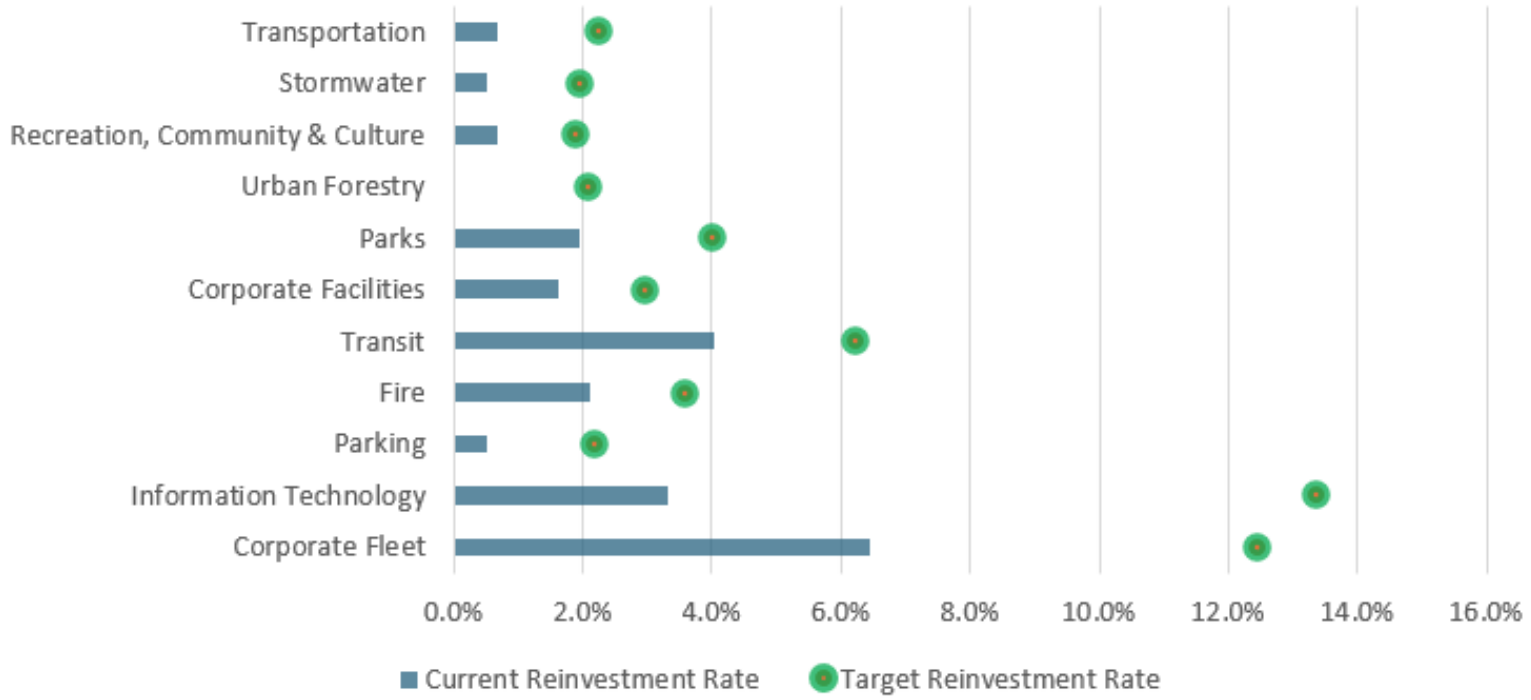


6.6.6 Reinvestment Rate

To determine the target reinvestment rate, the City utilized the estimated service life values from the asset inventory data. For example, if an asset has an estimated service life of 25 years, we calculate the target reinvestment rate as 100 ÷ 25 = 4%.

This reflects the annual capital requirement as a percentage of the total replacement cost. As assets continue to age and deteriorate, ongoing reinvestment is essential to maintain them in a state of good repair and sustain current service levels. By comparing the actual reinvestment rate (based on historic investments) and adding that to the target reinvestment rate, we can identify the funding gaps that may exist and inform future capital needs in **Figure 6-10**.

Figure 6-10: Target Reinvestment Rate and Actual Reinvestment Rate



6.6.7 Capital Budget Allocations 2021 to 2025

The earlier analysis focused on the 2024 capital budget, as 2025 was not yet available. As the City increased the level of investment for infrastructure renewal in 2025, the summary of the approved capital budgets from 2021 to 2025 is

presented in **Table 6-13,** which shows the allocation to infrastructure renewal as well as growth, new/enhanced and green initiatives.

Table 6-13: Capital Budget Allocations (2021 to 2025)

Year	Grand Total	Infrastructure Renewal	% Capital Budget	Growth	New/ Enhanced	Green
2021	$ 72,642,030	$ 50,218,240	69%	$ 15,161,630	$ 7,262,160	$
2022	$ 77,384,020	$ 52,929,539	68%	$ 8,065,776	$ 11,631,613	$ 4,757,092
2023	$ 72,572,264	$ 53,439,367	74%	$ 7,070,475	$ 8,800,225	$ 3,262,197
2024	$ 88,556,830	$ 63,051,877	71%	$ 5,075,826	$ 8,369,898	$ 12,059,229
2025	$ 105,425,163	$ 79,986,427	76%	$ 14,687,843	$ 6,186,910	$ 4,563,983
Total	**$ 416,580,307**	**$ 299,625,450**	**72%**	**$ 50,061,550**	**$ 42,250,806**	**$ 24,642,501**

As the infrastructure renewal budget is most relevant for asset management planning, the renewal ratio is calculated (using 2025 current replacement value), and the effective number of years of expected useful life (before replacement) is presented in **Table 6-14**.

Table 6-14: Renewal Ratio and Effective Lifecycle Replacement (2021 to 2025)

Year	Infrastructure Renewal	Renewal Ratio	Effective Lifecycle Replacement
2021	$ 50,218,240	0.70%	142 years
2022	$ 52,929,539	0.74%	135 years
2023	$ 53,439,367	0.75%	133 years
2024	$ 63,051,877	0.88%	113 years
2025	$ 79,986,427	1.12%	89 years

6.7 Recommended SOGR Investment Strategy

In summary, the EAMS-DSS incorporated the treatment logic for each asset type, scheduling replacement or rehabilitation treatment as required to maintain the state of good repair and deliver the expected performance from the infrastructure assets. Where there is a funding restriction in a given year, the EAMS-DD will incorporate risk in the selection of which treatments to schedule and which to delay.

To stabilize LOS in Year 10, **the recommended SOGR investment over 10 years is $1.2 billion**, with an annual average of $121.79 million, corresponding to an **average annual reinvestment rate of 1.70%.** Considering affordability, the approach is to start slow, with the first two years at the current level of investment, with the ramp up in years 3 to 6, then an additional step up for 7 to 9 and then year 10 onwards. Over the 10-year period, the overall reinvestment rate increases from 1.08% in Year 1 to 2.72% in Year 10, reflecting the growing demand for lifecycle renewal investments as asset networks age and more assets reach critical thresholds for intervention. The increasing trend also reflects the scenario's intent to proactively reduce future backlog and improve the long-term sustainability of service levels.

The total 10 Year Infrastructure Funding Gap between the Planned and Recommended SOGR Investments is $350 million.



See **Table 6-15** and **Figure 6-11** with the Recommended SOGR Investment compared with the Planned SOGR Investment. The Recommended SOGR Investment scenario achieves stabilized LOS in year 10. These investments are presented in current dollars. See **Figure 6-12** for 20-year investments comparing Planned SOGR with Recommended SOGR and **Table A-6-1** (**Appendix A**).

Table 6-15: Planned Compared with Recommended 10-Year Investments and Annual Infrastructure Gap

Year	Planned SOGR Investment	Recommended SOGR Investment	Annual Infrastructure Gap
1	$77,500,000	$77,500,000	-
2	$71,600,000	$71,600,000	-
3	$74,000,000	$97,700,000	$23,700,000
4	$78,800,000	$100,900,000	$22,100,000
5	$83,000,000	$121,100,000	$38,100,000
6	$93,300,000	$115,800,000	$22,500,000
7	$84,500,000	$133,000,000	$48,500,000
8	$97,100,000	$145,300,000	$48,200,000
9	$100,600,000	$160,300,000	$59,700,000
10	$108,000,000	$194,800,000	$86,800,000
Total	**$868,400,000**	**$1,217,700,000**	**$349,300,000**

Figure 6-11: Recommended 10-Year Reinvestment Rates

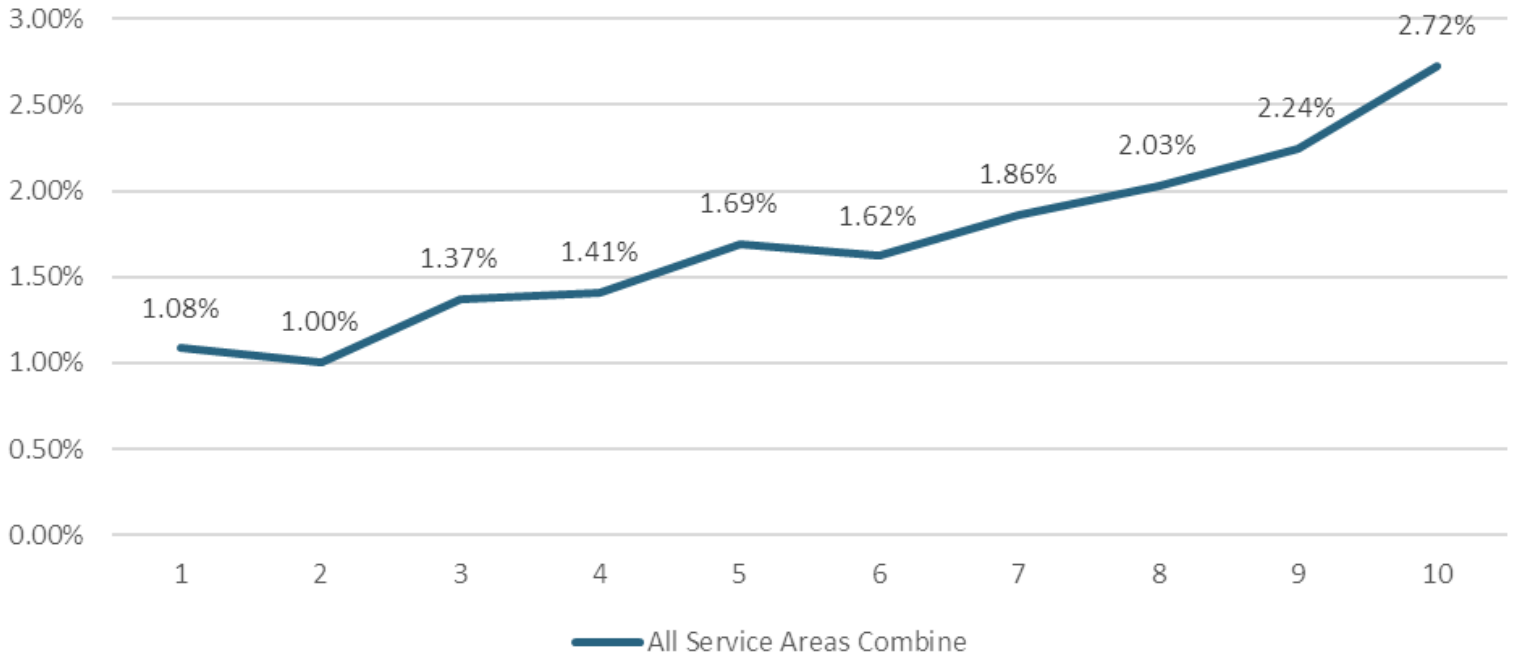
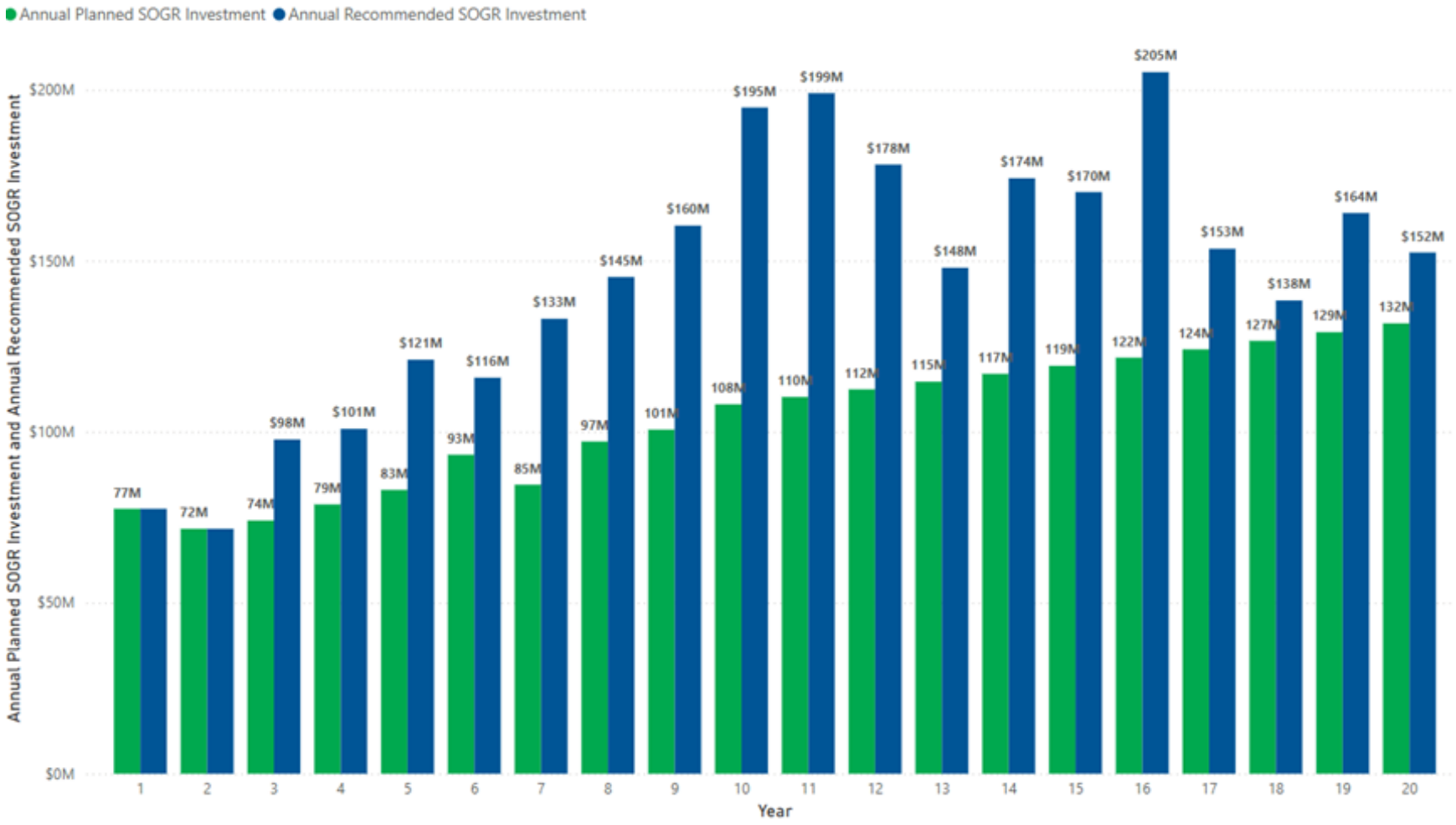


Figure 6-12: Annual Planned SOGR Investment and Annual Recommended SOGR (Year 1 to 20)



6.8 Funding Sources

The City relies on multiple sources to fund infrastructure renewal, but most notably tax revenues by way of the Infrastructure Renewal Levy. In addition, reserve funds are also crucial resources that are used to balance the impact to property taxes. Some reserve funds the City can and have utilized include:

- Burlington Hydro reserve fund
- Capital reserves and reserve funds (various)
- Parks and Recreation Infrastructure reserve funds (various)
- Federal and Provincial Gas Tax allocation

Furthermore, development charges help cover the costs of growth, while utility and regional recoveries support shared service-specific needs. The City actively pursues grants and funding from other levels of government, and general municipal revenue and debt financing also contribute to funding various infrastructure projects and services.

6.9 Risk Assessment

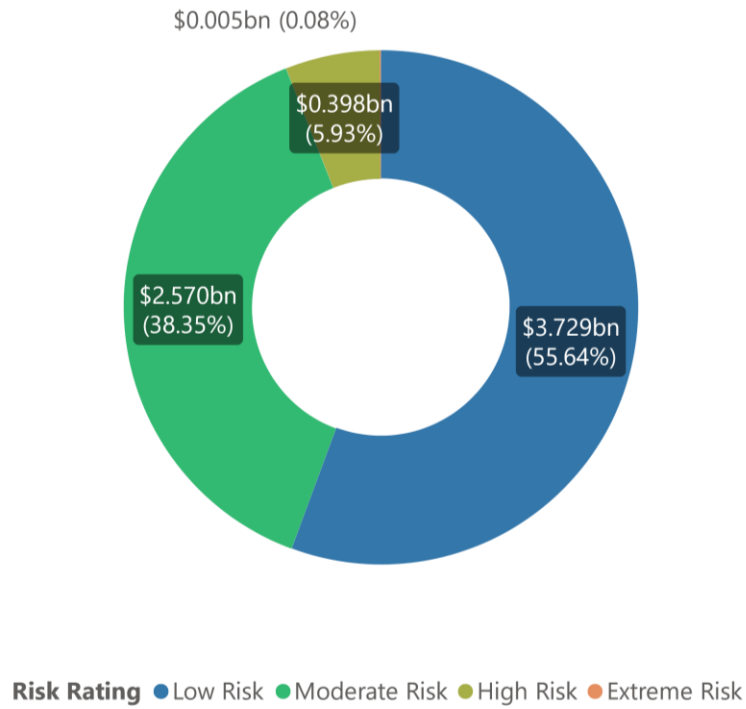
As the City adopts Pathway 2 to maintain the current Level of Service (LOS) across all asset categories, several risks must be considered if investments do not align with long-term asset sustainability.

- **Regulatory Risk:** Maintaining current LOS without adequate reinvestment may lead to non-compliance with O. Reg. 588/17, which requires municipalities to have a clear strategy to manage service levels and asset risks. Failure to address deteriorating conditions could trigger audits, increased provincial oversight, or funding limitations in future grant opportunities.
- **Health and Safety Risk:** Deterioration in asset condition poses increased risks to public safety. For example, degraded roads and sidewalks increase the risk of accidents; aging fire, fleet, and transit infrastructure can compromise emergency response and transportation reliability; and under-maintained recreational or facility assets may present hazards to public users. Proactive risk mitigation becomes harder as assets age without sufficient investment.

- **Financial Risk:** Deferring investment leads to compounding infrastructure backlogs. As assets move from fair to poor condition, the costs of repair or replacement increase exponentially. Without closing the funding gap, the City may face rising emergency repairs, higher insurance claims, and inefficient service delivery.

Under the Recommended SOGR Investment Scenario, the City's risk rating profile is improved, with a reduction in the percentage of assets in Extreme-, High-, and Moderate-risk, lowering from 50.15% to 44.36% by Year 10, and an increase in the percentage of assets in Low Risk from 49.15% to 55.64% by Year 10. See **Figure 6-13**.

Figure 6-13: Risk Rating by Replacement Value – Overall (Year 10)



6.10 Recommendations: Strategies for Addressing the Funding Gap

The City is recommending the implementation of a phased strategy to gradually increase annual capital contributions for infrastructure renewal. This can be achieved through a combination of the following strategies.

6.10.1 Master Plan Restructuring to Reflect Infill Development

Restructure the City's master planning approach to maximize the utilization of existing assets while reducing the usage of new assets/facilities. This master planning restructuring exercise is consistent with the infill nature of future development in Burlington to accommodate residential growth. The previous greenfield development model of adding new assets/facilities using population increase "triggers" is no longer appropriate during the upcoming period of infill/intensification-driven development.

A potential reduction in planned future growth-related assets/facilities will reduce the asset management financial exposure. Master plan restructuring will also reduce the negative financial impacts of Development Charge "leakage" onto the property tax that results from mandatory DC rate discounts imposed by the province. While increased utilization of existing assets/facilities may reduce replacement lifecycles, the savings associated with avoiding/deferring new growth-related assets/facilities should provide a significant net financial benefit.

6.10.2 Business Service Reviews

An option the City can consider is reviewing existing services to explore opportunities where a shared services model can be implemented with other municipalities. Shared service delivery platforms can reduce costs and /or increase revenues depending on whether the City is a "buyer" or a "seller" of shared services. Shared service models are appropriate for both public-facing services as well as administrative support functions.

6.10.3 Prioritized and Targeted Investment Strategy

The City recommends developing a prioritized investment plan that focuses on addressing the most critical and high-risk asset categories, particularly roads and stormwater, to maintain the current LOS. This should involve:

- **Detailed Risk Assessment:** Conduct a comprehensive risk assessment to identify assets with the highest likelihood of failure and the most significant potential impact.
- **Condition-Based Prioritization:** Allocate funding based on the current condition and remaining useful life of assets, prioritizing those in the most critical need of repair or replacement.
- **Optimization of Maintenance Programs:** Enhance preventative maintenance programs to extend the lifespan of existing assets and reduce the need for premature capital expenditures.

6.11 Financing Principles, Opportunities and Strategies

6.11.1 Financing Principles

The City's annual budgets shall balance the AMP priority to stabilize service levels in consideration of acceptable risk and condition. Sustainable, predictable funding is vital to delivering reliable service to residents. The City remains committed to sound fiscal management and transparency of its infrastructure and investment decisions will consider the total cost of asset ownership, including acquisition, operation, maintenance, and disposal, to ensure that assets are managed in a fair and sustainable manner for present and future residents of the City. Matching ongoing expenses with ongoing revenues as much as possible is important to ensuring the sustainability of the financial plan.

The following core guiding principles will support the financial health and sustainability of the asset management program:

- **Intergenerational Equity:** Long-term infrastructure will be financed using tools that share costs with future users.
- **Transparency and Accountability:** Decisions will be documented, justified, and communicated clearly. Budgets and plans will be made available to the public.

- **User-Pay Principle:** Where feasible, users will contribute to costs through user fees, development charges, or utility rates.
- **Asset Renewal Priority:** Renewal and maintenance will be prioritized over new asset acquisition unless justified by growth or strategic value.
- **Risk-Based Approach:** Investments will be guided by risk assessments and the criticality of services.

6.11.2 Financing Opportunities

The City requires significant and sustained investment to meet the needs associated with achieving target service levels. While the City will continue to optimize and make full use of existing funding sources, it will also actively pursue additional funding opportunities. Several revenue options are available (see **Table 6-16**); however, in many cases, these do not represent ongoing or guaranteed sources of funding.

Table 6-16: Revenue Options for Sources of Funding

Revenue Option	Description
Taxation Revenues	• Adjustments to the dedicated Infrastructure Renewal levy, funded from property tax revenue annually to replenish reserve funds. • Consider phased increases to the levy based on the needs as outlined in the AMP.
User Fees and Charges	• Increase cost recovery or apply full-cost pricing principles. • Review the suitability and feasibility of applying new dedicated fees to fund maintenance and enhancements of assets. • Review and adjust existing fees.
Development Charges (DCs)	• DCs are used to fund new growth-related infrastructure per the Development Charges Act.

Revenue Option	Description
	• Future updates to the DC Background Study will align with service-level targets, which will impact AMP priorities.
Grants and Government Transfers	• Grants are received by the City from senior levels of government and include the Provincial Gas Tax, Federal Gas Tax, and Investing in Canada Infrastructure Program. • Continue to actively pursue federal and provincial infrastructure grants and maintain a grant readiness pipeline to align projects with funding opportunities.
Debt Financing	• Using debt financing for large capital projects with long useful lives, and when lifecycle savings or intergenerational fairness are evident. • Strategically balance the needs of the AMP with other municipal priorities to maintain debt within established Council-approved thresholds.
Reserves and Reserve Funds	• Established by the Council, reserves and reserve funds are an essential element of the City's financial plan that assist with long-term financial stability and financial planning. • Used to cushion the impact that major expenditures would otherwise have on tax rates each year. • Reserves are established for future purposes, and the revenues to these funds come from a variety of sources, including property taxes, user fees, and grants. • Establish new dedicated reserve funds to manage specific assets. • Develop reserve policies that define minimum target balances and replenishment strategies. • Annual contributions should align with asset depreciation and renewal forecasts.
Other / Alternative Sources	• Public-Private Partnerships

6.11.3 Financial Strategies

The above scenarios demonstrate the forecasted funding requirements for the City's infrastructure and the effect of the existing budget on the condition of the asset portfolio.

Based on the lifecycle strategies currently defined, the planned budget will **not** be sufficient to meet infrastructure needs over the long term. To meet the unfunded reinvestment needs, the City will consider a variety of strategies to effectively address the deficit.

These strategies may include, but are not limited to, the following:

- **Increasing Access to Revenue:** through increases to existing revenues, exploring access to new revenues, and leveraging maximum dollars from federal and provincial capital funding.
- **Future Adjustments to Levels of Service:** review options to maintain, stabilize or improve existing levels of service and explore where reductions to service levels are possible.
- **Apply an Affordability Lens to Policy Development and Strategic Plans:** to ensure guiding policies and service-specific master / strategic plans (e.g., Integrated Mobility Plan), outline full lifecycle implementation costs and consider what the City can afford.
- **Review Assets in Poor to Very Poor Condition:** to ensure critical infrastructure continues to receive adequate funding to address any Poor to Very Poor condition assets and mitigate the risk of assets deteriorating to this condition.
- **Improve the Alignment Between the Budget Process and Asset Management:** as the asset management program and budget process operate as a system that offers the greatest benefit if processes between each are fully integrated. Ongoing alignments between the asset management program and the budget process will allow for improved decision-making related to capital infrastructure requirements and associated operational budget impacts through the implementation of short-term and near-term actions.

6.12 Uncertainty and Assumptions in Forecasts

There are several uncertainties that can significantly affect the timing and value of asset renewal needs, the availability of funding, and the accuracy of financial forecasts. These uncertainties influence the City's ability to deliver services while balancing service levels, costs, and associated risks. Asset managers must navigate increasing service demands, tight budgets, and the risks tied to those decisions.

Key uncertainties and assumptions include:

- **Climate Change and Weather Variability:** As noted in the City's Strategic Asset Management Policy, climate change continues to influence planning and decision-making. However, unpredictable weather, particularly increased rainfall -creates capacity and performance challenges for stormwater, transportation, and other infrastructure assets. This increases the uncertainty in forecasted costs. Climate variability affects infrastructure in multiple ways, including accelerated deterioration, shortened service life, and reduced asset reliability. This will result in greater demand for reactive maintenance and adjustments in maintenance schedules, renewal plans, and capital investments. The City allocates funding to support climate adaptation where feasible. For example, funding has been set aside for stormwater management to mitigate flooding caused by extreme weather events.
- **Economic Conditions:** Global and local economic shifts can impact the financial assumptions in this AMP. Recent examples include inflationary pressures from tariffs and changing trade policies, which have driven up the cost of materials and supplies - directly affecting the City's financial capacity.
- **Legislative Changes:** While legislative changes that impact expenditures are typically communicated in advance, they may not always align with the 10- or 60-year planning horizons considered in this AMP. Unexpected regulatory changes could therefore affect future funding requirements.
- **Aging Infrastructure:** As infrastructure continues to age and deteriorate, increased investment in lifecycle activities is needed to maintain service levels. While the City's early adoption of asset management practices has helped

reduce costs, ongoing improvements to these practices and the use of innovative technologies are necessary to further minimize long-term asset ownership costs.

- **Human Resources:** The ability to plan and deliver infrastructure projects may be affected by staffing constraints. Limited staff capacity can hinder the City's responsiveness to service expectations and project timelines.
- **New Initiatives:** New initiatives, whether originating from the Council, master plans, or other sources, create additional financial and operational pressures. To manage this, the City should ensure that all proposals for new programs or services include a comprehensive analysis of associated costs and risks. This will help decision-makers fully understand the potential asset impacts before implementation.
- **Levels of Service and New Service Demands:** Current levels of service are primarily based on asset condition, which aligns with O. Reg. 588/17 compliance. However, service levels must also account for other key performance indicators such as safety, availability, connectivity, and public satisfaction. Council inquiries are often reflective of community priorities and are treated as direct feedback on desired service levels.

To meet future regulatory and community expectations, the City is working toward defining service levels that are centered on customer outcomes and service delivery. This includes striking a balance between expectations, affordability, and risk. The City is committed to engaging stakeholders to better understand evolving needs and incorporate them into future updates of the AMP.

6.13 Implementation Roadmap (Future Initiatives)

6.13.1 Long-Term Financial Plan (LTFP)

It is important that the City's financing strategy of the AMP continues to balance service levels with impacts to the City's financial resources. The City will be completing an LTFP to holistically review and consolidate all funding requirements and financial resources across the corporation. The AMP will be one of many inputs used to inform the LTFP and will allow the City to determine funding resources and strategies to support the AMP in stabilizing service levels.

6.13.2 Reserve and Reserve Fund Review

Capital reserves and reserve funds are important components of the City's capital financing planning and are used extensively for the maintenance and renewal of assets. Ensuring they continue to be utilized optimally and appropriately is vital to supporting the service priorities in the AMP. A comprehensive review of all the City's reserves and reserve funds will be completed as part of the long-term financial plan to ensure that funding provisions are strategically aligned with priorities across the corporation.

6.13.3 Asset Investment and Financing Plan Performance Monitoring

The following actions support asset investment and financing plan performance monitoring:

- Track key performance indicators (KPIs) such as:
    - Percentage of the asset funding gap closed annually.
    - Reserve fund balance as a percentage of the target.
    - Asset condition ratings over time.
- Track Asset Renewal Funding Ratio performance:
    - Compare actual asset renewal and replacement expenditure to previously forecast renewals to improve capital renewal forecasting.
- Develop an Asset Sustainability Ratio (ASR):

- Asset replacement expenditure relative to depreciation expense.

6.14 Summary

This AMP has been updated to meet the requirements of O. Reg. 588/17, which requires additional information to meet Clause 6 – Proposed Levels of Service.

Each of the requirements in Clause 6 of the regulation are listed in **Table 6-17**, with the City's response to each requirement.

Table 6-17: Response to the Clause 6 Regulatory Requirements

Requirement	Response
1-For each asset category, the levels of service that the municipality proposes to provide for each of the 10 years	The City's proposed LOS is to maintain the current LOS over the 10-year period, with an overall corporate target to stabilize LOS across the City's assets. The City has selected three corporate LOS metrics: reinvestment rate, backlog and % Poor or Very Poor. The current LOS is presented in the State of Local Infrastructure reports (**Appendix B-1** to **B-11**) for each of the 11 service areas. The overall corporate summary can be found in Section 2 and **Appendix A-5**.
2-An explanation of why the proposed levels of service under paragraph 1 are appropriate for the municipality	The proposed LOS aligns with the City's strategic plan and is consistent with the City's objective 5 – Delivering and maintaining fiscally sustainable services and infrastructure under Focus Area 4 – Driving Organizational Performance.
3- The proposed performance of each asset category for each year of the 10-year period referred to in paragraph 1	The performance of each asset category is measured by the Overall Service Index (OSI), a standardized numerical metric used to indicate an asset's position within its

Requirement	Response
	lifecycle. It reflects the overall service status of an asset by incorporating one or more factors, depending on the asset type. For some assets, OSI is based solely on the condition index derived from inspection or inferred from age. For others, it combines age with specialized service indices such as the Pavement Quality Index (PQI) or Facility Condition Index (FCI). OSI scores range from 0 (new) to 6 (end of life), where each whole number marks the threshold between the service condition categories. See **Appendix A-5** for OSI scores for corporate (overall) and each service area for each year of the 10 years.
4- A lifecycle management and financial strategy that sets out the following information	N/A
Lifecycle activities	Lifecycle activities are listed in the **Appendix B-1 to B-11** (State of Local Infrastructure reports) for each service area.
Risks associated with options	Risks are presented in **Section 6.9**.
Estimate of annual costs for each of the 10 years for lifecycle activities, capital expenditures and significant operating costs.	Estimates of Annual SOGR Investments are presented in **Section 6.7,** Recommended SOGR Investments in **Table 6-15** and **Appendix A-6**. Operating costs in **Table 6-10**.
Annual funding projected to be available to undertake lifecycle activities, and an explanation of the options examined by the municipality to maximize the funding projected to be available.	Information provided in **Section 6.0**, Financial Strategy section of the AMP.
If, based on the funding projected to be available, the municipality identifies a funding shortfall for the lifecycle activities, identify which lifecycle activities the municipality	TBD

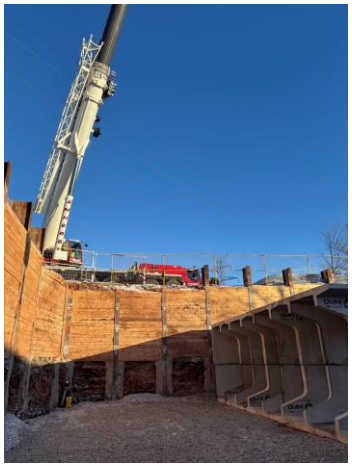
Requirement	Response
will undertake and an explanation of how the municipality will manage the risks associated with not undertaking any of the lifecycle activities.	
6-The estimated capital expenditures and significant operating costs to achieve the proposed levels of service as described in paragraph 1 are to accommodate projected increases in demand caused by population and employment growth.	Information provided in the **Section 5.4 Growth**, specifically **Table 5-6** and **Appendix A-4** and **Appendix A-6**.
7- An explanation of any other key assumptions underlying the plan that have not previously been explained.	N/A

7.0 Continuous Improvement and Monitoring

The City of Burlington (City) has demonstrated a strong commitment to advancing asset management practices, prioritizing sustainable service delivery, long-term infrastructure planning, and regulatory compliance. To build on this foundation, the City has developed a framework for continuous improvement and monitoring that ensures its asset management strategies remain responsive, efficient, and aligned with community expectations.

Establishing a structured continuous improvement program enables the City to adapt to emerging risks, optimize asset performance, and extract maximum value from infrastructure investments. This approach supports proactive decision-making, enhanced service delivery, and improved transparency.





A tentative reporting and review schedule is provided below in **Table 7-1**.

Table 7-1: Asset Management Review and Reporting Schedule

Activity	Frequency
Update KPIs and service levels.	Annually
Asset condition assessments	3–5 years (asset-specific)
Risk assessment refresh	Every 2 years
AMP update	Every 5 years or as required
Council and Provincial reporting	Annually
Staff training and capacity review	Annually

The City adheres to the continuous improvement plan methodology shown in **Figure 7-1**, which provides a structured approach to advancing asset management practices over time.

Figure 7-1: Continuous Improvement Plan Methodology



7.1 Objectives of Continuous Improvement and Monitoring

- Ensure the long-term sustainability, performance, and efficiency of municipal assets.
- Strengthen data-driven decision-making to support infrastructure planning and budgeting.
- Improve service reliability and enhance risk mitigation.
- Increase accountability and stakeholder engagement.
- Support compliance with Ontario Regulation 588/17 and future regulatory frameworks.

7.1.1 Strategic Focus Areas for Improvement

- **Standardized Data Collection:** Develop and implement consistent data standards for all assets, including replacement value, age, and condition metrics.
- **Enhanced Condition Assessments:** Expand asset condition assessment programs to reduce reliance on age-based assumptions and improve forecasting for lifecycle interventions.
- **Service Level and Performance Updates:** Integrate regular updates to levels of service and performance indicators into the annual reporting process to reflect evolving expectations and regulatory requirements.
- **Integration of Master Plans:** Align asset management planning with master plan recommendations, incorporating new or revised service level targets.
- **Lifecycle Modeling Improvements:** Further analyze and enhance asset lifecycle models within the EAMS DSS.
- **Risk Management Enhancements:** Conduct detailed risk reviews to validate high-risk assets and develop mitigation strategies or prioritized capital projects.
- **Alignment with Annual Budget Process:** Improve coordination between asset management recommendations and the City's capital and operating budget cycles, ensuring that service levels and risk assessments inform funding decisions.

7.1.2 Monitoring and Evaluation Strategies

- **Performance Metrics:** Define key performance indicators (KPIs) for asset condition, lifecycle cost efficiency, service levels, and risk exposure.
- **Data Collection and Analysis:**
  - Implement real-time monitoring tools where feasible.
  - Conduct scheduled inspections and condition assessments.
  - Utilize predictive analytics to forecast future capital and operating needs.
- **Asset Management Maturity Assessment:** Conduct periodic evaluations of the City's asset management maturity to benchmark progress and identify gaps.
- **Council Reporting:** Provide annual updates to the Council, including progress on implementation, performance against targets, and emerging risks or funding pressures.

7.1.3 Continuous Improvement Strategies

- **Annual Review Cycles:** Conduct annual reviews of asset performance, budget alignment, service levels, and the application of emerging technologies.
- **Adaptation to Emerging Trends:** Integrate innovative technologies (e.g., AI) and solutions (e.g., EAMS), explore innovative delivery models, and assess alternative financing and funding approaches.
- **Training and Capacity Building:** Provide ongoing education and training for staff in data management, lifecycle planning, risk analysis, and service optimization.

7.2 Implementation Framework

- **Governance Structure:** Clearly defined roles and responsibilities across departments, senior leadership, and external partners to ensure coordinated action and accountability.
- **Resource Allocation**: Dedicated funding, staffing, and technology investments to support continuous improvement initiatives.

By embedding continuous improvement and monitoring into the asset management program, the City of Burlington will be better positioned to address emerging challenges, extend asset life, and deliver high-quality, reliable services to the community. This approach ensures that infrastructure decisions are transparent, risk-informed, and aligned with long-term strategic goals. See key actions and future initiatives in **Table 7-2**.

Table 7-2: Focus Area, Future Initiatives and Key Actions

Focus Area	Future Initiatives	Key Actions
Strategic Alignment	Inform update to Burlington's 25-year Strategic Plan	Include asset management commitments in the Council's strategic priorities or guiding principles.
Growth and Demand Management	Integrate growth infrastructure into Asset Management Planning	Update AM Plans to include new infrastructure from development. Reflect increased demand in lifecycle cost projections and risk assessments. Housing strategy alignment by ensuring the financial sustainability of growth, prioritizing infrastructure investments in strategic growth areas and coordinating capital delivery with housing development timelines.
Data-Driven Decision Making	Data improvement strategies	Asset inventory validation and addressing data quality and completeness gaps. Centralizing and integrating data systems (GIS / EAMS Work Order / DSS solutions). Asset creation business workflows.
Lifecycle Modelling Enhancements	Improve the accuracy and effectiveness of lifecycle planning	Refine lifecycle activity planning using the EAMS-DSS tool.

Focus Area	Future Initiatives	Key Actions
		Improve forecasting of capital renewal timing and costs across asset classes.
Climate Change Resilience	Embed climate change adaptation into asset strategies	Identify and include costs for climate-resilient upgrades in infrastructure projects (e.g., SWMPs). Forecast impacts of climate-related hazards on maintenance and renewal. Integrate climate as a risk driver in asset risk assessments (likelihood of failure).
Financial Alignment and Optimization	Align capital planning with external funding opportunities and sustainability goals	Track and forecast climate-related operating and capital costs. Align investment priorities with federal/provincial funding programs. Incorporate lifecycle and climate adjustments into budget development processes.


CITY OF
Burlington



City of Burlington

Asset Management Plan 2025

Appendix A



City of Burlington

Asset Management Plan 2025

Appendix A-1

Strategic Asset Management Policy

Corporate Policy

Roadways/Infrastructure

Strategic Asset Management Policy

Approved by Council on: Sept 23, 2019

Report Number: CW-30-19

Effective: July 1, 2019

Reviewed on:

Amended:

Next Review: July 1, 2024

Note:

1.0 Background

Ontario Regulation 588/17 Asset Management Planning for Municipal Infrastructure in the Infrastructure for Jobs and Prosperity Act, 2015 sets out principles to guide asset management planning in Ontario municipalities.

The Strategic Asset Management Policy replaces the current corporate policy brought forward for Council approval in December 2016 (CW-32-16 – Asset Management Policy and Plan Update report).

2.0 Purpose

The Strategic Asset Management Policy (SAMP) describes the City of Burlington's commitment and direction for asset management and aligns with both the Corporate Strategic Plan and the priorities set out in the Vision to Focus plan . It outlines the principles that guide staff in the development and administration of corporate asset management.

It is intended to compliment and support the City's strategic plan and other core documents by:

- Outlining the guiding principles and requirements for implementing consistent asset management processes throughout the City;

- Affirming the City's ongoing commitment to ensure asset management processes are aligned and integrated into the City's strategic planning process and other key plans and policies; and
- Define asset management responsibilities and accountabilities for Council, leadership, management, and staff;

3.0 Corporate Alignment

The Strategic Asset Management Policy will support the following:

- City of Burlington 25-Year Strategic Plan
- Council and Leadership team workplan ('Vision to Focus')
- Long-term financial plan
- Asset or service-focused master plans
- Community energy plan
- Development Charges Background Study and Bylaw

The City shall take into account any applicable budgets or fiscal plans released under the following:

- Fiscal Transparency and Accountability Act, 2004
- Budgets adopted under part VII of the Municipal Act, 2001
- Ontario's Land Use Planning Framework
- Any relevant policy statements issued under subsection 3(1) of the Planning Act, any provincial plans as defined in the Planning Act and the City's Official Plan.

Most corporate plans rely on physical assets owned by the city and the commitment of staff to ensure their strategic use. This includes the long-term maintenance, repair, and replacement of existing assets along with the acquisition of new assets that meet the evolving needs of the community.

4.0 Scope and Responsibility

This policy applies to those service areas within the City that manage existing and new physical capital assets or asset systems, in the ultimate delivery of services to the citizens of the City of Burlington. Asset management does not replace existing corporate strategy, business planning and capital or operating investment planning processes already in place. Instead, it aims to complement and align to these initiatives, with the intent to provide an asset-centric point of view that supports business strategies, objectives and plans.

The policy requires the commitment of key stakeholders within the city's organizational structure. The following details the responsibilities of key stakeholders within the city.

Council

- Approves by resolution all asset management strategies and plans
- Receives annual updates of the city's asset management progress
- Approves by resolution infrastructure funding through the annual budget process
- Supports ongoing asset management continuous improvements and efforts needed to meet Ontario Regulation 588/17 requirements

Corporate Asset Management Committee / Corporate Infrastructure Committee

- A committee composed of staff leads representing all asset-focused service areas across the city
- The committee is responsible for the asset management planning across the municipality and maintaining compliance with the regulation
- The committee is responsible for the development of corporate asset management tools and practices and oversees their application across the organization
- The committee provides a forum for discussion of asset management strategy, integration and best practices

Asset Category Leads

- Oversees asset decision support activities that fall within their service area and in support of others.

Corporate Finance

- Oversees the management of the city's asset management financing plan to ensure its alignment with the city's long term financial plan
- Satisfies financial reporting requirements for assets based on capitalization thresholds which are separate from the asset management planning process
- Coordinates asset investment planning (budget development)

5.0 Policy

5.1 The City owns, operates, and maintains a number of infrastructure assets. Good asset management planning ensures that as infrastructure ages and deteriorates over time, assets will continue to meet defined levels of service over the long term, and will be managed for present and future users in a sustainable manner.

5.2 In order to meet organizational goals and objectives, the City of Burlington will aim to incorporate the following principles into service delivery and asset management practices:

5.2.1 **Holistic** – The City shall take a comprehensive approach to asset decision support and investment planning that considers the "big picture" and the combined impact of the whole asset life cycle. The City shall consider all assets in a service context and take into account the relationships between different asset types/classes to better optimize decision-making.

5.2.2 **Strategic and Forward Looking** – To meet future challenges the City shall take a long-term view when making decisions about infrastructure, including consideration of changing demographic and economic trends and future legislative requirements.

5.2.3 **Health & Safety Focus** – The City shall ensure that the health and safety of employees involved in the construction, renewal an maintenance of infrastructure is protected.

5.2.4 **Customer Service Focus** – The City shall have clearly defined levels of service that are focused on both customer outcomes and service delivery while balancing customer expectations with risk and affordability. The City will actively encourage community and stakeholder collaboration to better understand current and future stakeholder needs, to ensure they are incorporated into our asset management plans.

5.2.5 **Systematic** – The City shall adopt a formal, consistent and repeatable approach to asset management that is transparent and leverages data for evidence-based decision-making.

5.2.6 **Risk-based** – The City shall manage the risk associated with attaining defined levels of service by ensuring that resources, expenditures, and priorities are allocated based upon risk and associated cost/benefit and risk tolerance.

5.2.7 **Value-based affordable** – The City shall make asset investment decisions based on balancing service, risk and whole life cost. Asset life-cycle treatments chosen will aim to reduce the overall costs to the City while still meeting defined levels of service. The City shall apply full lifecycle costing principles when evaluating capital and operating asset investments.

5.2.8 **Sustainable** – The approach to service delivery is financially achievable over the long term, is not wasteful of resources, and minimizes the impact of infrastructure on the environment by augmenting resilience to the effects of climate change. The City shall take a "triple bottom line" approach to managing assets and making both short and long term infrastructure investment decisions.

5.2.9 **Environmentally conscious** – The City shall minimize the impact of infrastructure on the environment and manage the risks, and the increased cost required to manage risks, due to climate change. The City shall develop an approach for integrating climate change considerations throughout the asset management

process, and seek opportunities to increase community resilience to the impacts of climate change.

5.2.10 **Integrated** - The City shall continue to engage and coordinate our asset management activities with the Region of Halton (water, waste water, transportation services) and other neighboring municipalities to share best practices and information.

5.2.11 **Innovation and Continuous Improvement** – The City shall continually improve its asset management approach by making use of innovative technologies, services and practices.

6.0 Key Terms and Definitions

Asset: An item, thing or entity that has potential or actual value to an organization

Asset Life Cycle: The time interval that commences with the identification of the need of an asset and terminates with the decommissioning of the asset or any associated liabilities

Asset Management: The coordinated activity of an organization to realize value from assets. Involves the balancing of costs, opportunities and risks against desired performance of assets in order to achieve organizational objectives.

Asset Management Plan: A plan, or series of plans, developed by the City that specify the activities, resources and timescales required for an individual asset, or grouping of assets, to achieve defined level of service objectives.

Level of Service (LOS): The parameters of combination of parameters that reflect the social, political, economic, and environmental outcomes that the organization delivers. Levels of service statements describe the outputs or objectives an organization or activity intends to deliver to customers



City of Burlington

Asset Management Plan 2025

Appendix A-2 Condition Rating Scales

Condition Rating Scales

Table A-2-1: Condition Rating Scales

Condition Rating	Overall Service Index	Condition Score	Condition Score	FCI	PQI	BCI	Performance or Life Remaining	Definition
Very Good	1	100-80	5	0.01 - 0.02	80 - 100	86 - 100	"Very Good" or >80% of life remaining	The infrastructure in the system or network is generally in very good condition, typically new or recently rehabilitated. A few elements show general signs of deterioration that require attention.
Good	2	60-79.9	4	0.03 - 0.05	67 - 79	71 - 85	"Good" or 60 – 80% of life remaining	The infrastructure in the system or network is in good condition; some elements show general signs of deterioration that require attention. A few elements exhibit significant deficiencies.
Fair	3	40-59.9	3	0.06 - 0.1	55 - 66	61 - 70	"Fair" or 40 – 60% of life remaining	The infrastructure in the system or network is in fair condition; it shows general signs of deterioration and requires attention. Some elements exhibit significant deficiencies.

Condition Rating	Overall Service Index	Condition Score	Condition Score	FCI	PQI	BCI	Performance or Life Remaining	Definition
Poor	4	20-39.9	2	0.11 - 0.49	35 - 54	41 - 60	"Poor" or 20 – 40% of life remaining	The infrastructure in the system or network is in poor condition and mostly below standard, with many elements approaching the end of their service life. A large portion of the system exhibits significant deterioration.
Very Poor	5	0-19.9	1	0.5 - 1	0 - 34	0 - 40	"Very Poor" or <20% of life remaining	The infrastructure in the system or network is in unacceptable condition with widespread signs of advanced deterioration. Many components in the system exhibit signs of imminent failure, which is affecting service.
Unknown								This category is reserved for assets where data is either missing, not updated, or cannot be considered reliable. Flagging this data helps the departments identify where gaps in information exist and allows them to develop assessment plans to improve future data reliability and accuracy.

Legend:

FCI – Facility Condition Index (range from 0 to 1.0)

PQI – Pavement Quality Index (range from 0 to 100)

BCI – Bridge Condition Index (range from 0 to 100)



City of Burlington

Asset Management Plan 2025

Appendix A-3

Online Survey Results

Project Report

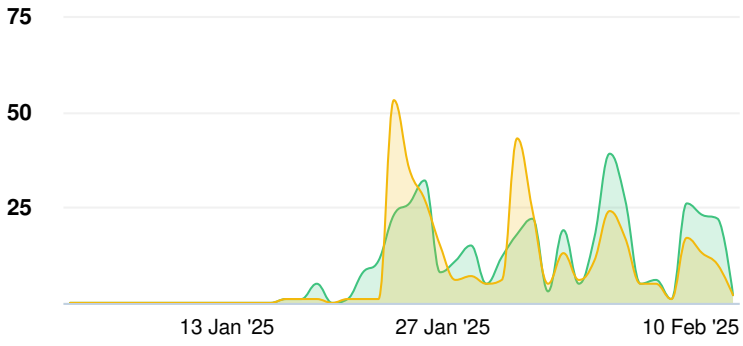
01 January 2025 - 13 February 2025

Get Involved Burlington

Asset Management Plan

GRANICUS

Visitors Summary



Highlights

TOTAL VISITS
385

MAX VISITORS PER DAY
53

NEW REGISTRATIONS
0

ENGAGED VISITORS
181

INFORMED VISITORS
206

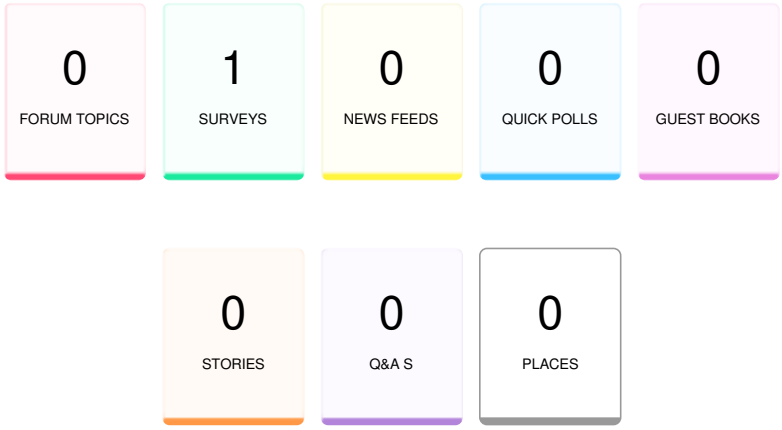
AWARE VISITORS
327

Aware Participants	327
Aware Actions Performed	Participants
Visited a Project or Tool Page	327

Informed Participants	206
Informed Actions Performed	Participants
Viewed a video	1
Viewed a photo	0
Downloaded a document	2
Visited the Key Dates page	0
Visited an FAQ list Page	0
Visited Instagram Page	0
Visited Multiple Project Pages	22
Contributed to a tool (engaged)	181

Engaged Participants	181		
Engaged Actions Performed	Registered	Unverified	Anonymous
Contributed on Forums	0	0	0
Participated in Surveys	5	0	176
Contributed to Newsfeeds	0	0	0
Participated in Quick Polls	0	0	0
Posted on Guestbooks	0	0	0
Contributed to Stories	0	0	0
Asked Questions	0	0	0
Placed Pins on Places	0	0	0
Contributed to Ideas	0	0	0

ENGAGEMENT TOOLS SUMMARY



Tool Type	Engagement Tool Name	Tool Status	Visitors	Contributors		
				Registered	Unverified	Anonymous
Survey Tool	Asset Management Plan Survey	Draft	220	5	0	176

INFORMATION WIDGET SUMMARY

1	0	2	0	0
DOCUMENTS	PHOTOS	VIDEOS	FAQS	KEY DATES

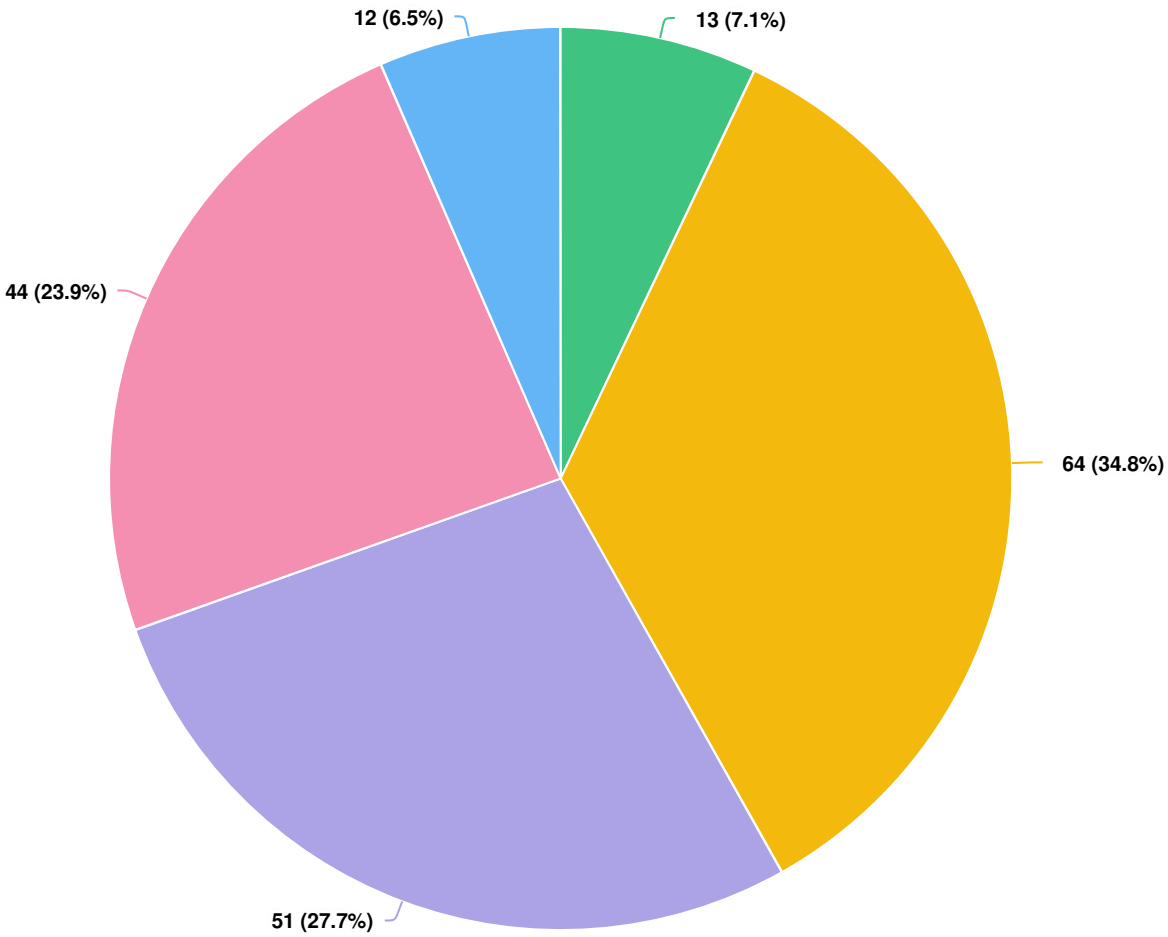
Widget Type	Engagement Tool Name	Visitors	Views/Downloads
Document	2021-Burlington-Asset-Management-Plan.pdf	2	2
Video	Implementing Asset Management	1	1
Video	Why invest in Asset Management?	0	0

ENGAGEMENT TOOL: SURVEY TOOL

Asset Management Plan Survey

Visitors 220	Contributors 181	CONTRIBUTIONS 184

How satisfied are you with transportation infrastructure?



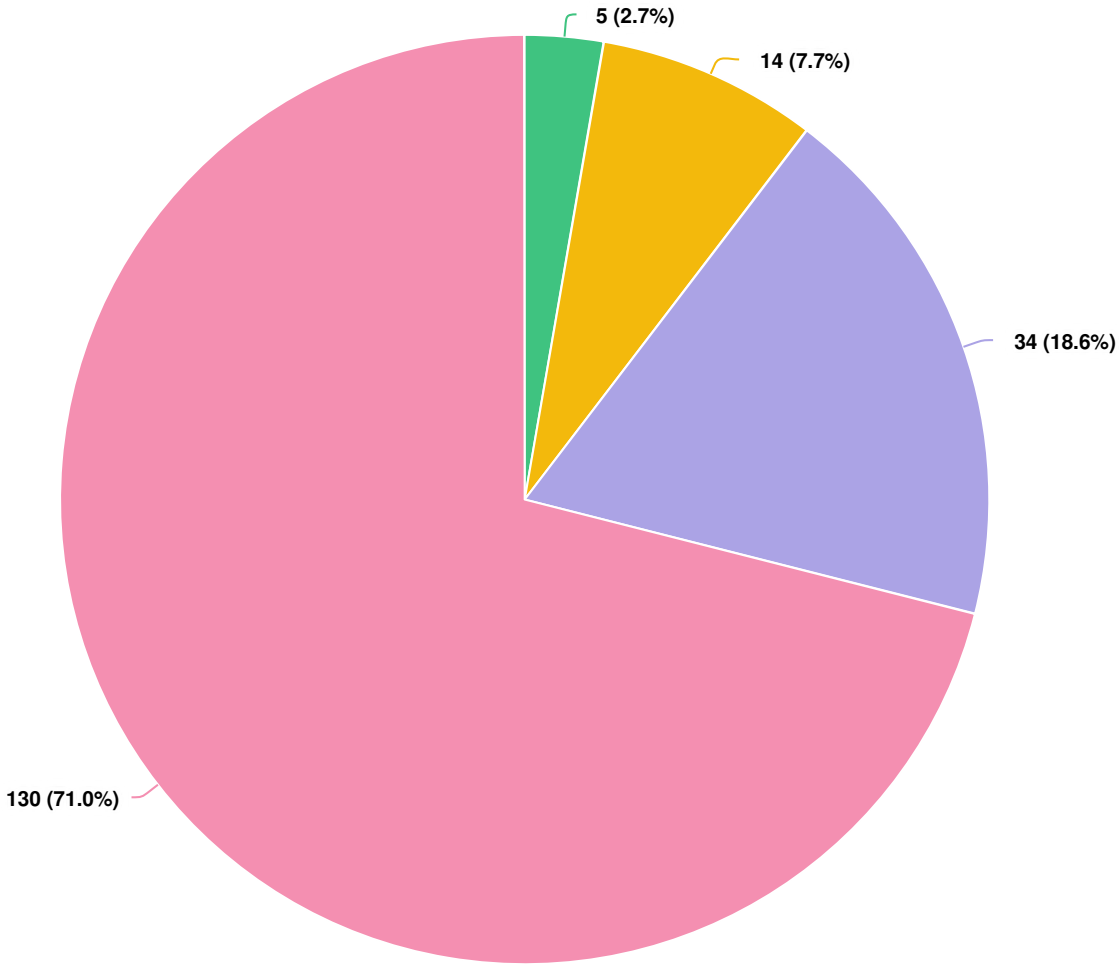
Question options

Very satisfied Satisfied Neutral Dissatisfied Very dissatisfied

Optional question (184 response(s), 0 skipped)

Question type: Radio Button Question

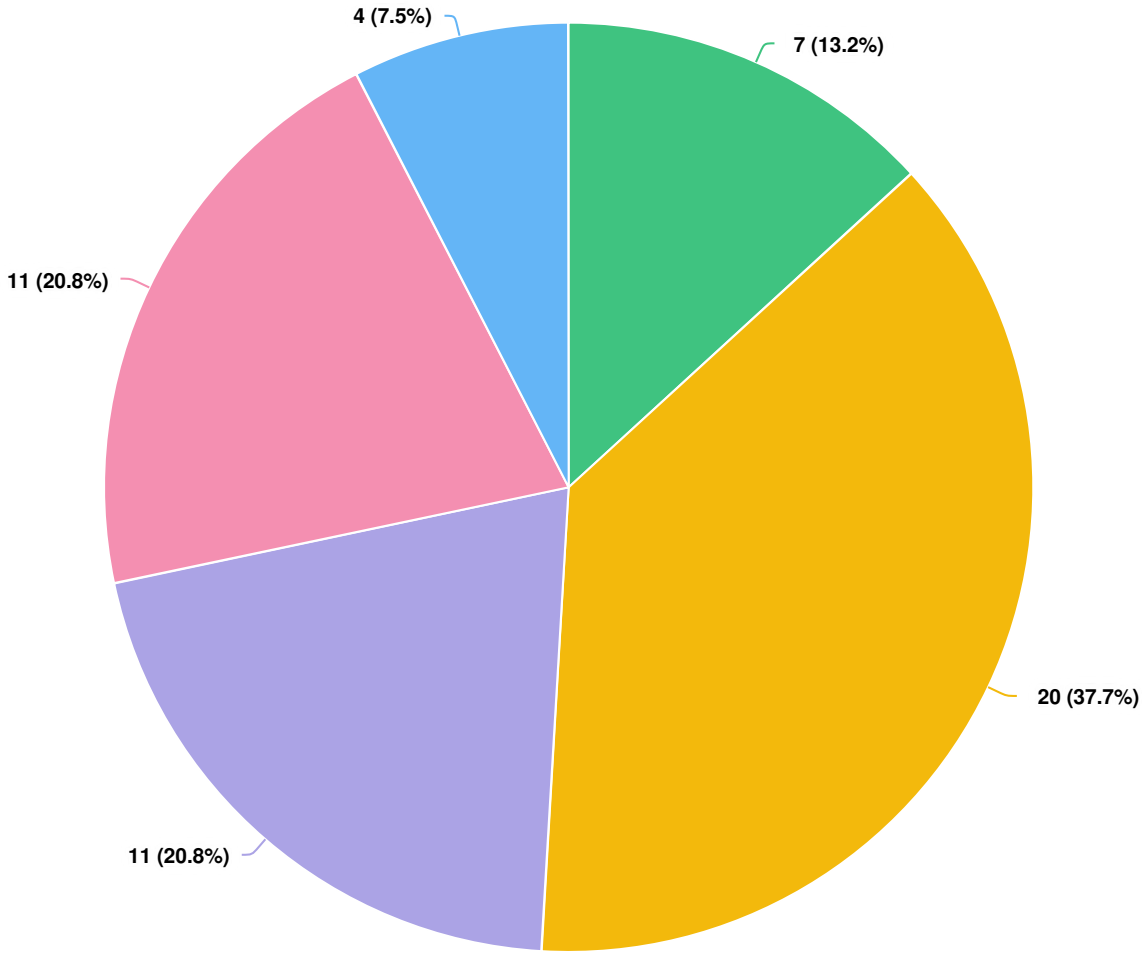
How often do you use transit infrastructure?



Optional question (183 response(s), 1 skipped)

Question type: Radio Button Question

How satisfied are you with the City's transit infrastructure?



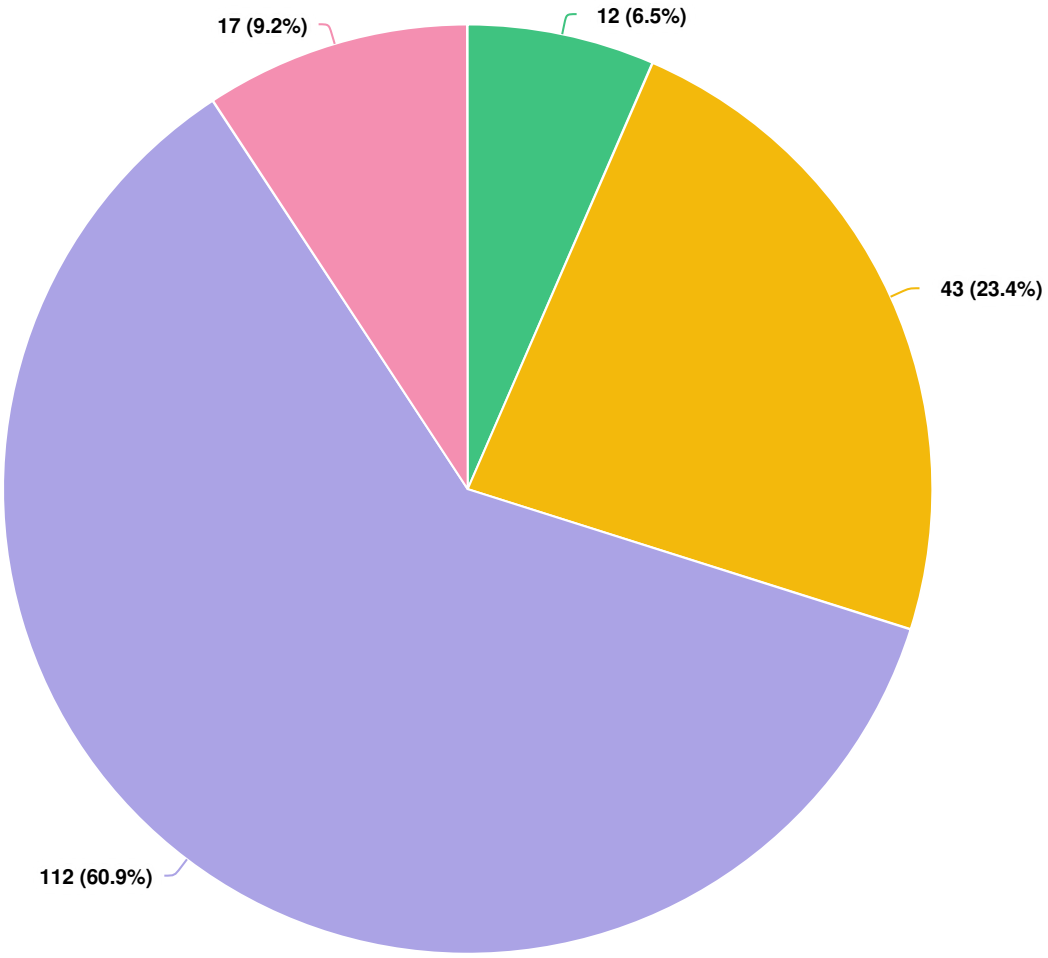
Question options

Very satisfied Satisfied Neutral Dissatisfied Very dissatisfied

Optional question (53 response(s), 131 skipped)

Question type: Radio Button Question

How often do you use parking infrastructure?



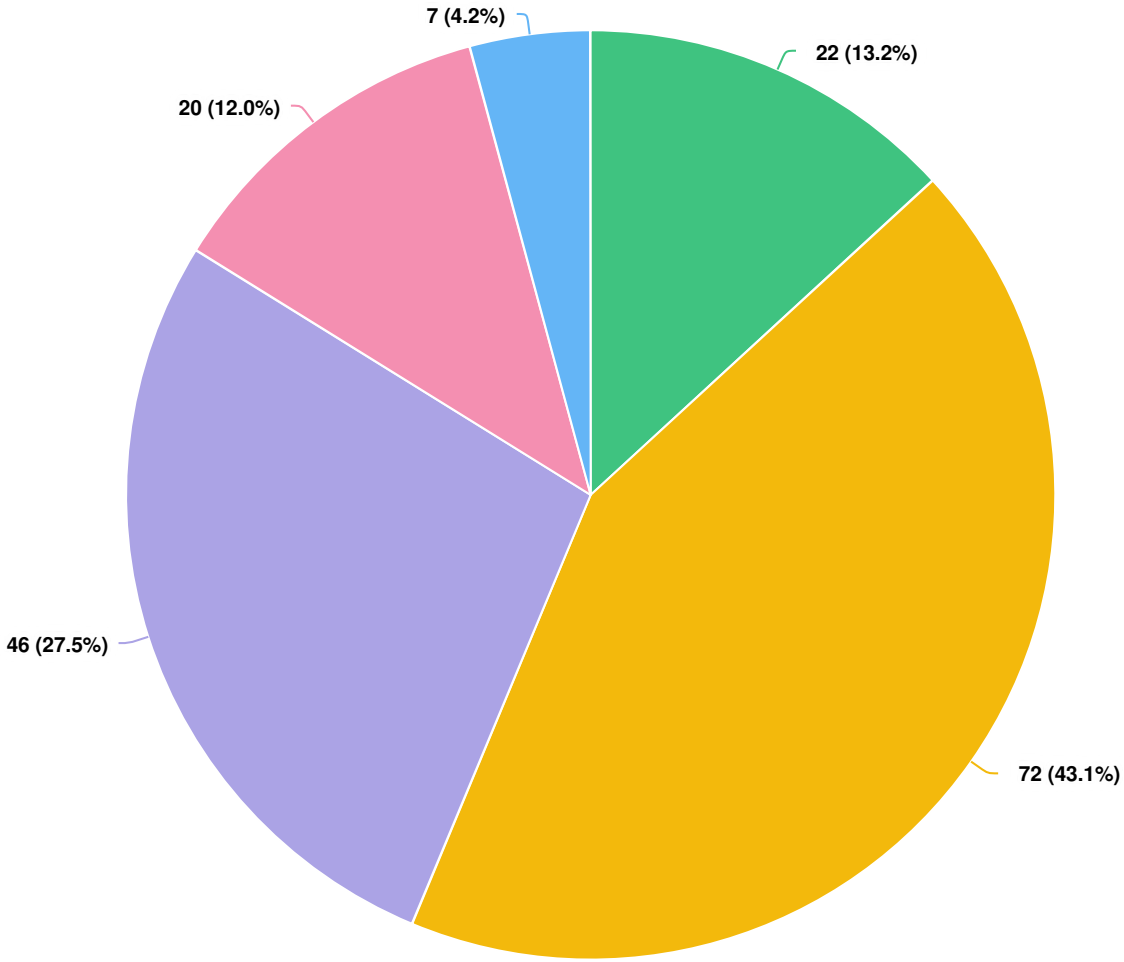
Question options

Daily Weekly Monthly Never

Optional question (184 response(s), 0 skipped)

Question type: Radio Button Question

How satisfied are you with the City's parking infrastructure?



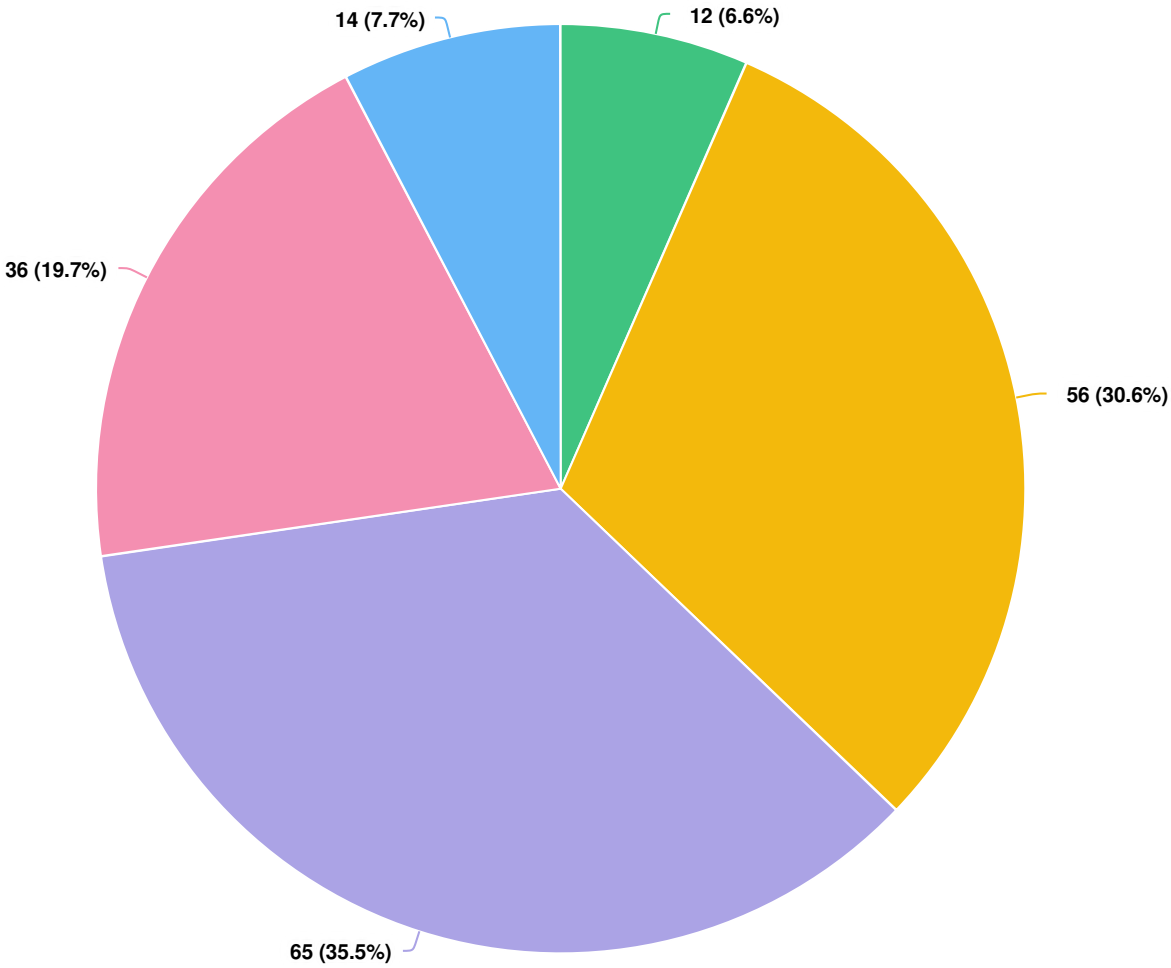
Question options

Very satisfied Satisfied Neutral Dissatisfied Very dissatisfied

Optional question (167 response(s), 17 skipped)

Question type: Radio Button Question

How satisfied are you with the City's stormwater infrastructure?



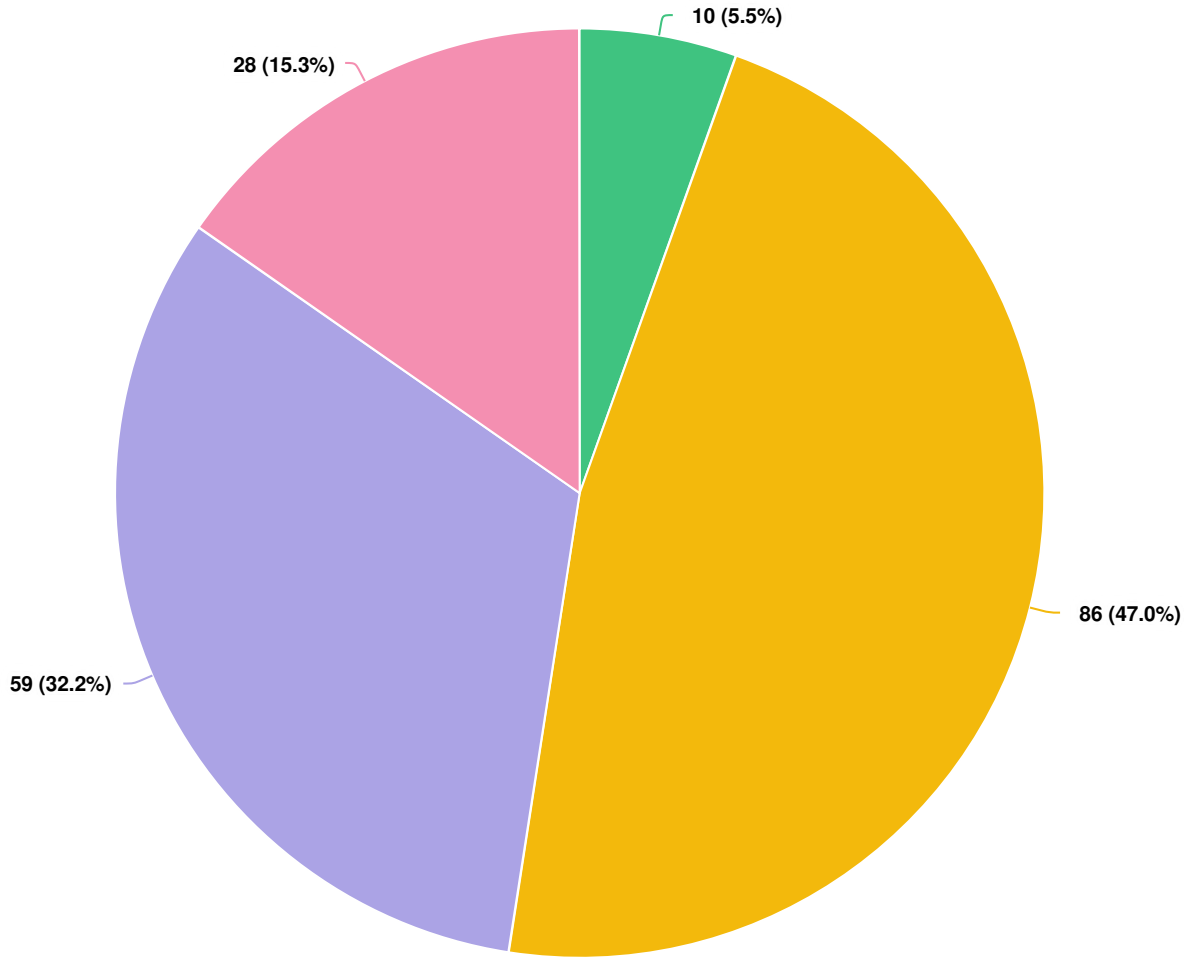
Question options

Very satisfied Satisfied Neutral Dissatisfied Very dissatisfied

Optional question (183 response(s), 1 skipped)

Question type: Radio Button Question

How often do you use recreation,community and culture facilities?



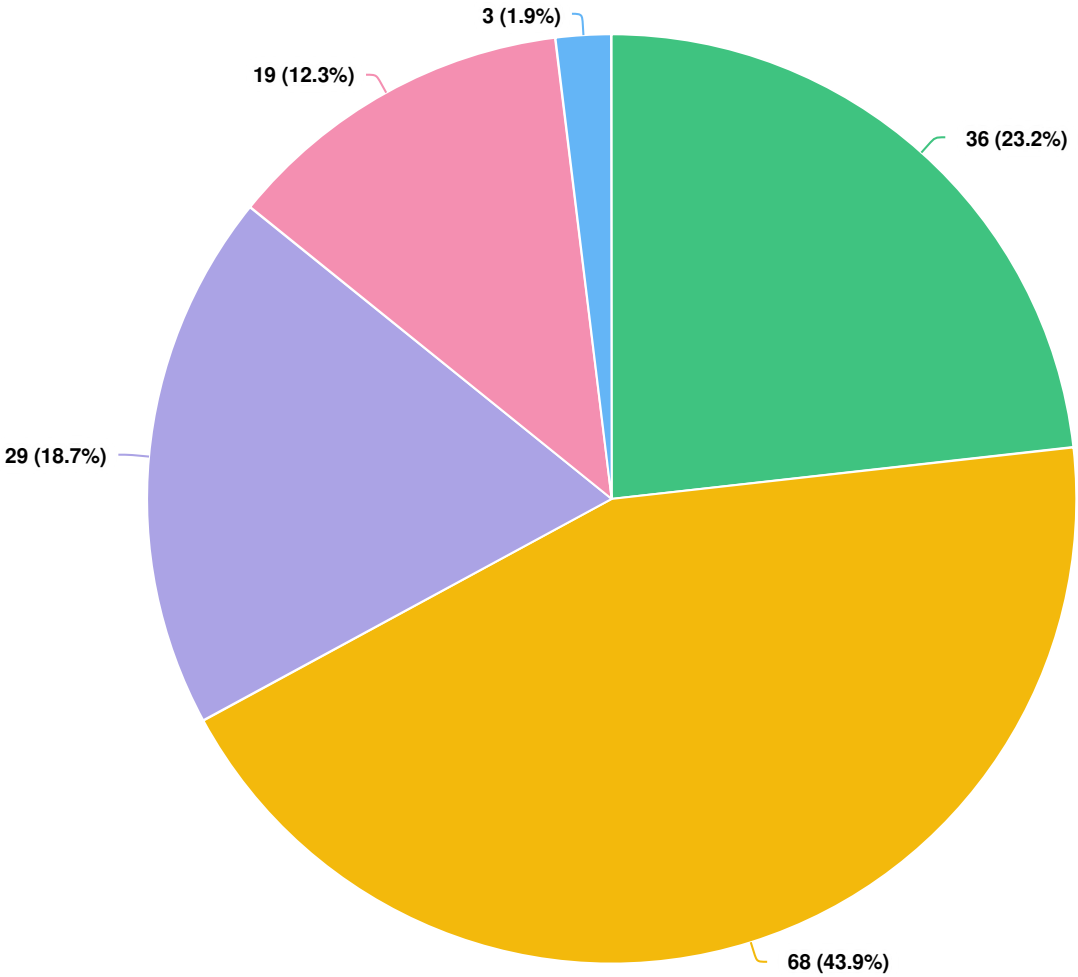
Question options

Daily Weekly Monthly Never

Optional question (183 response(s), 1 skipped)

Question type: Radio Button Question

How satisfied are you with the City's recreation, community and cultural facilitites?



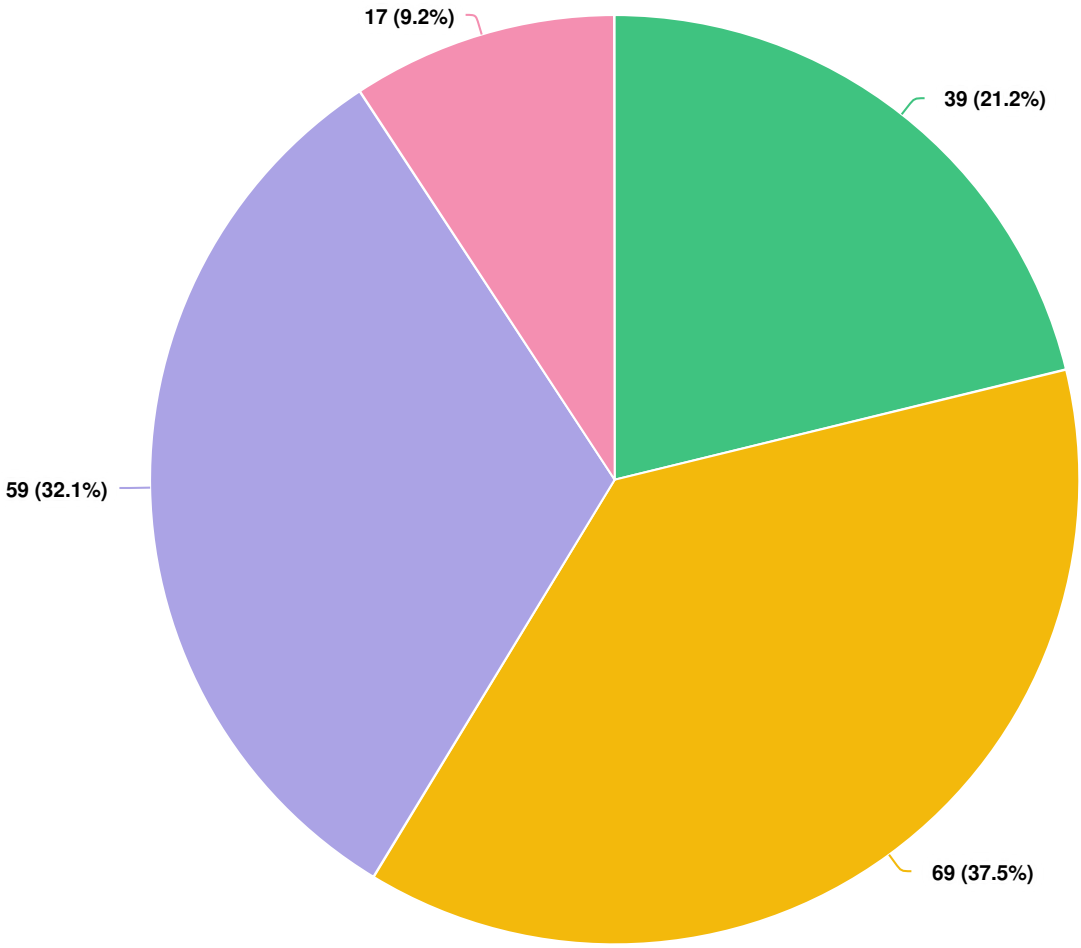
Question options

Very satisfied Satisfied Neutral Dissatisfied Very dissatisfied

Optional question (155 response(s), 29 skipped)

Question type: Radio Button Question

How often do you use assets in City Parks?



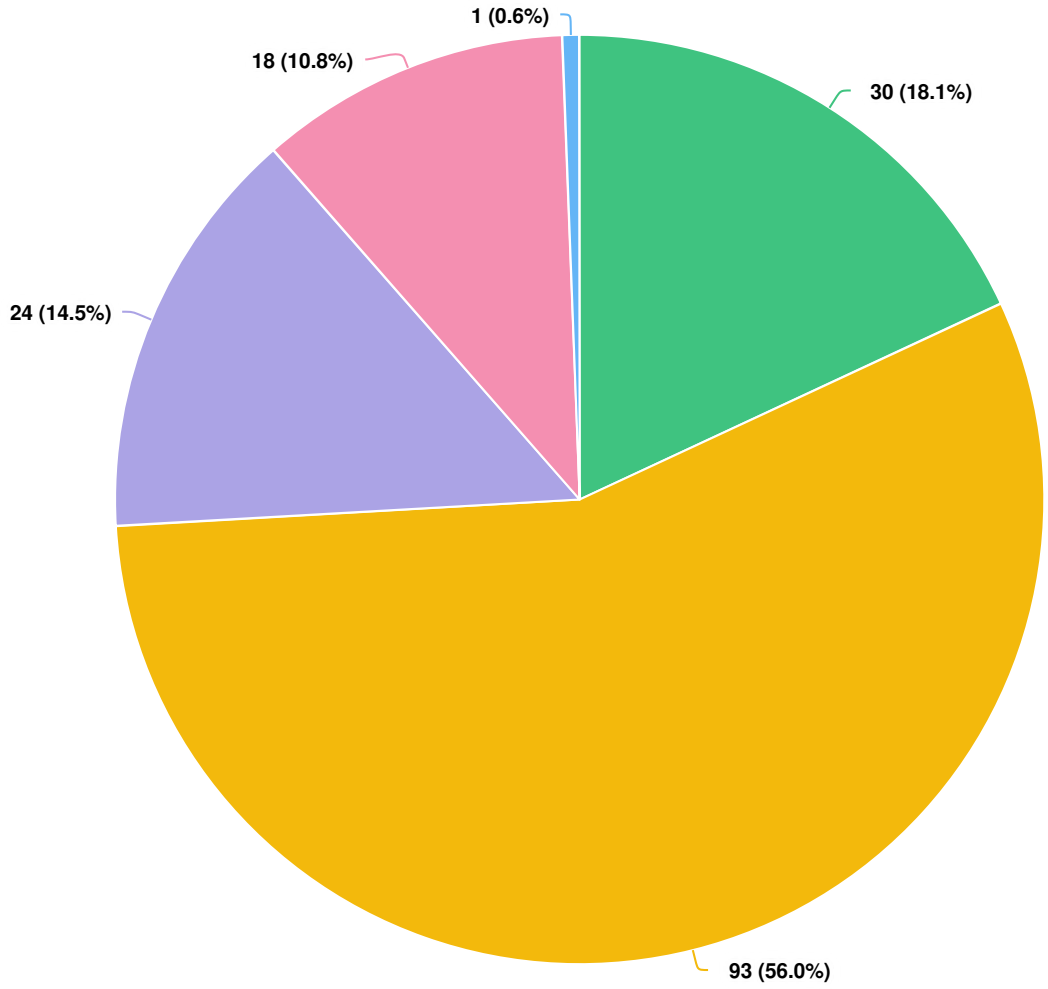
Question options

Daily Weekly Monthly Never

Optional question (184 response(s), 0 skipped)

Question type: Radio Button Question

How satisfied are you with the assets within the City's parks?



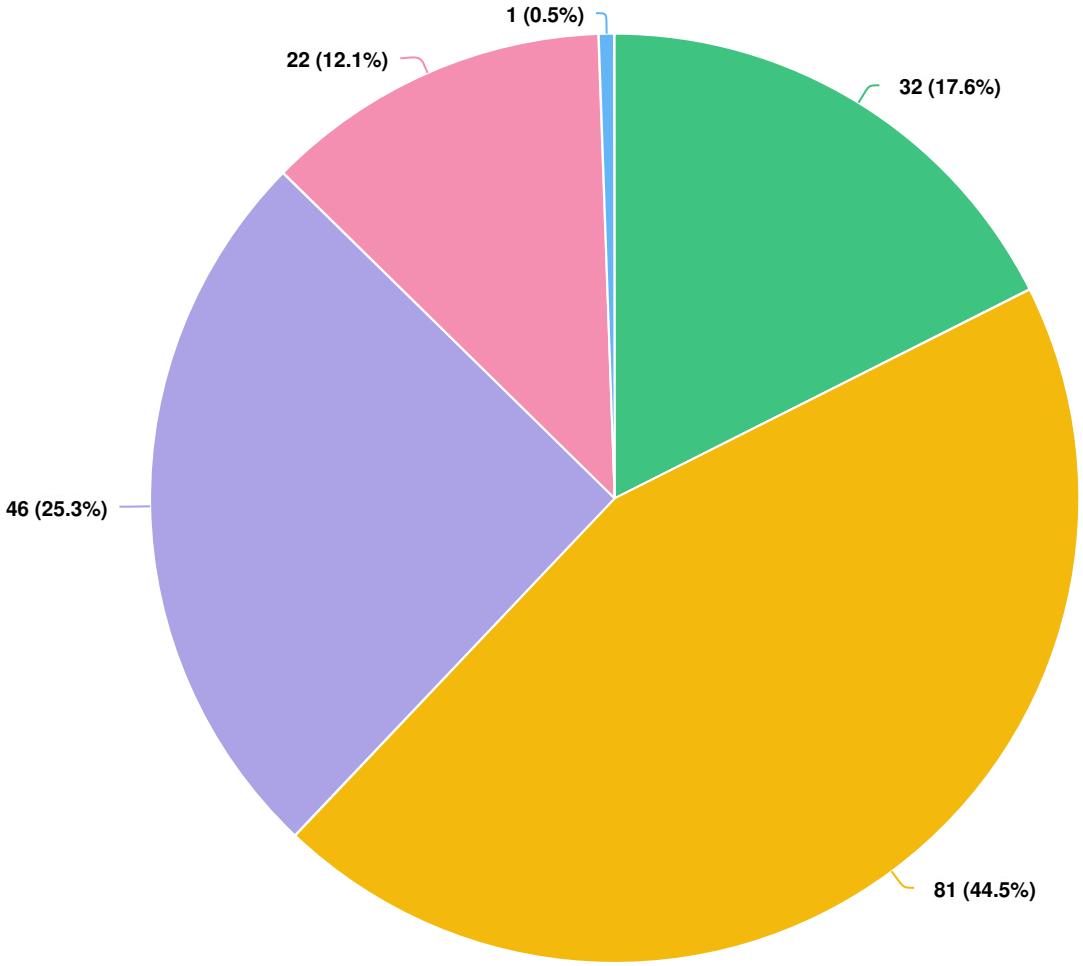
Question options

Very satisfied Satisfied Neutral Dissatisfied Very dissatisfied

Optional question (166 response(s), 18 skipped)

Question type: Radio Button Question

How satisfied are you with the City's trees and woodlots?



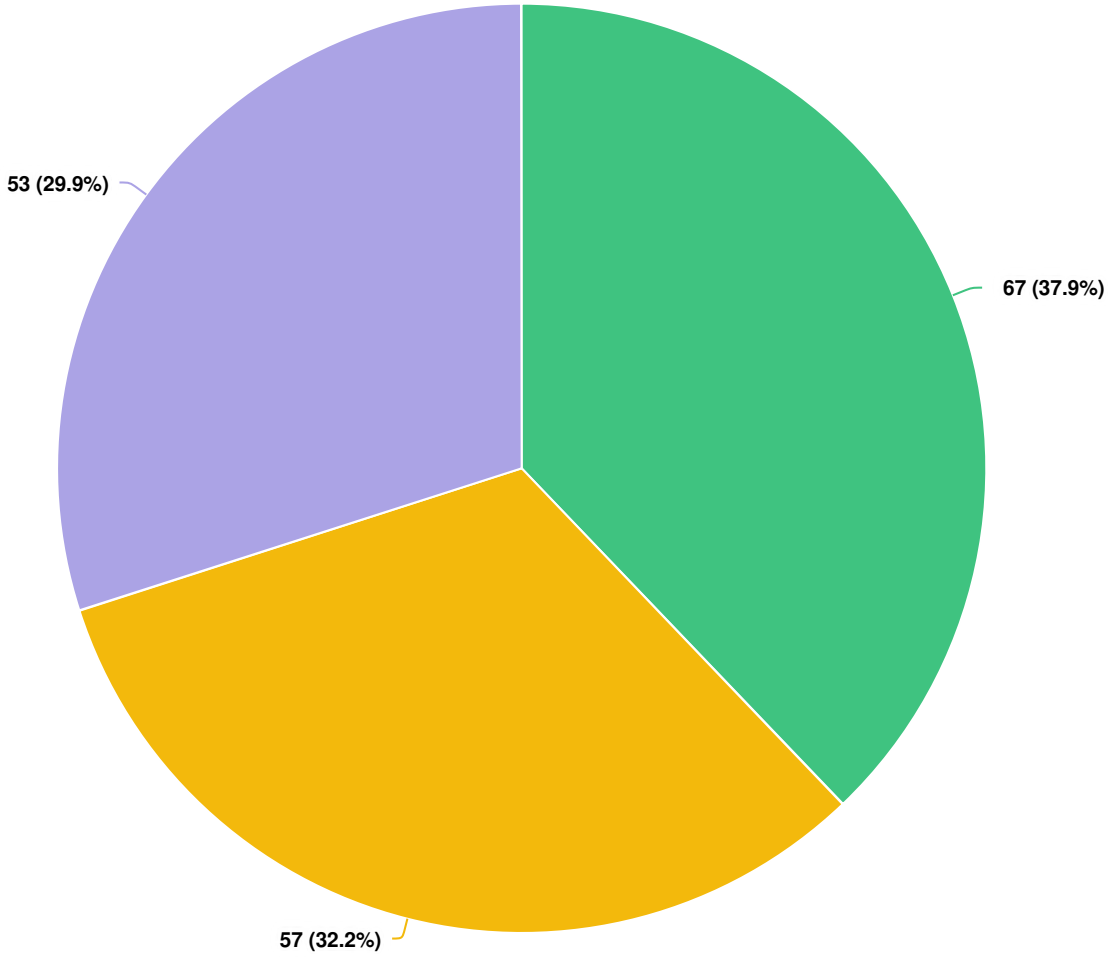
Question options

Very satisfied Satisfied Neutral Dissatisfied Very dissatisfied

Optional question (182 response(s), 2 skipped)

Question type: Radio Button Question

Based on your use/experience with the City's infrastructure, do you feel the City is investing enough in maintaining its municipal infrastructure?



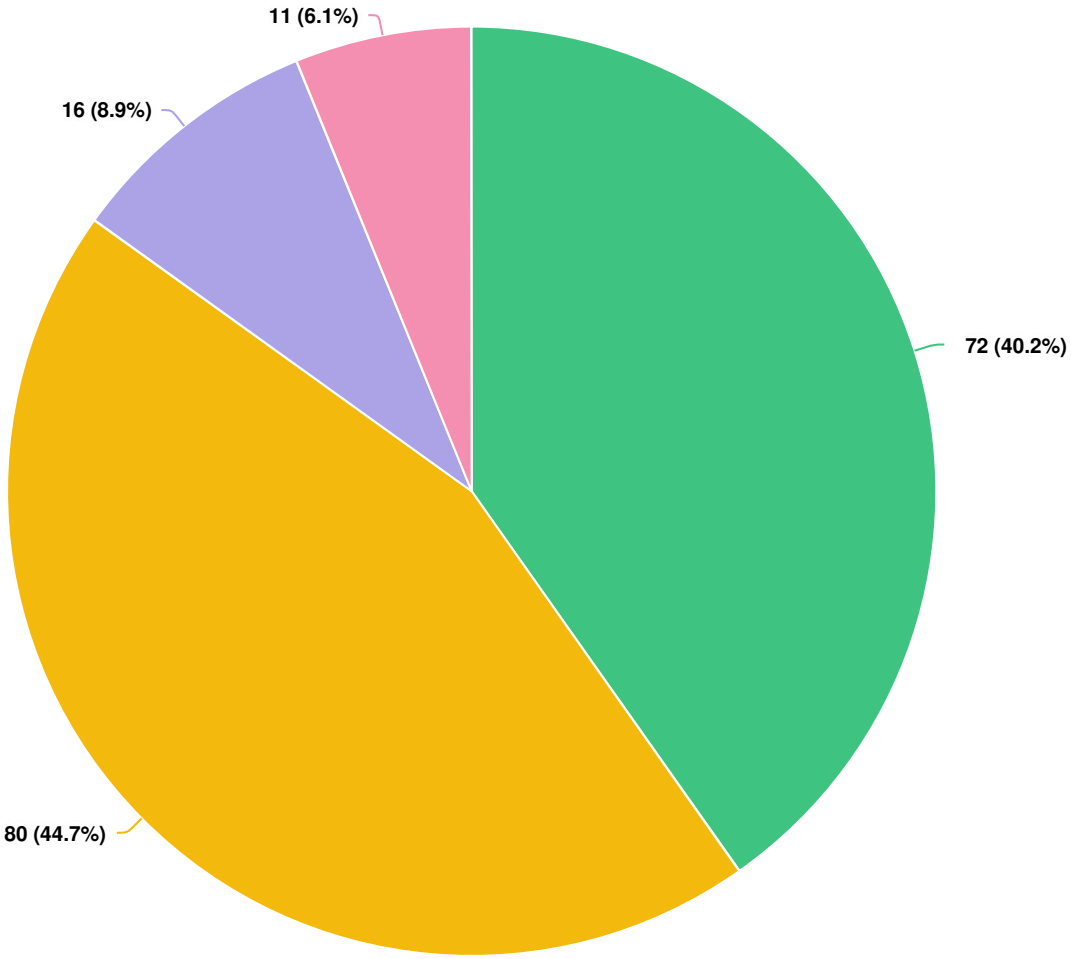
Question options

Yes No Unsure

Optional question (177 response(s), 7 skipped)

Question type: Radio Button Question

Which of the following options best reflects your willingness to pay in support of infrastructure management in the City?



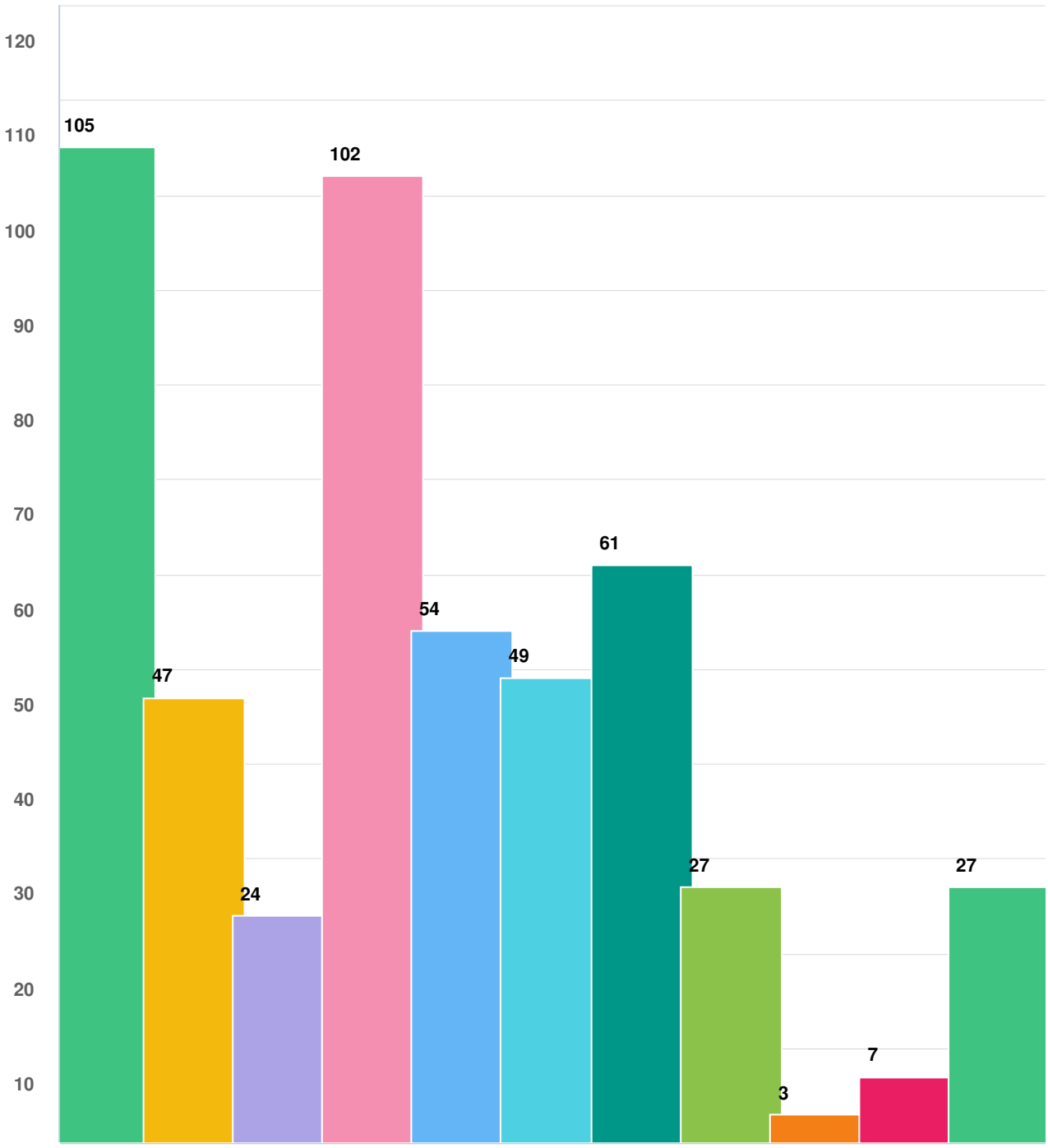
Question options

- The city maintain its current investment in infrastructure.
- The city increase investment in infrastructure, enhancing reliability/quality of the city's infrastructure.
- The city reduce investment in infrastructure, decreasing reliability/ quality of the city's infrastructure.
- Unsure

Optional question (179 response(s), 5 skipped)

Question type: Radio Button Question

The City needs to make difficult decisions on how to prioritize and allocate limited resources. Based on your use or experience with the City's infrastructure, please check off which of the following you would like to see improved or enhanced. (sel...



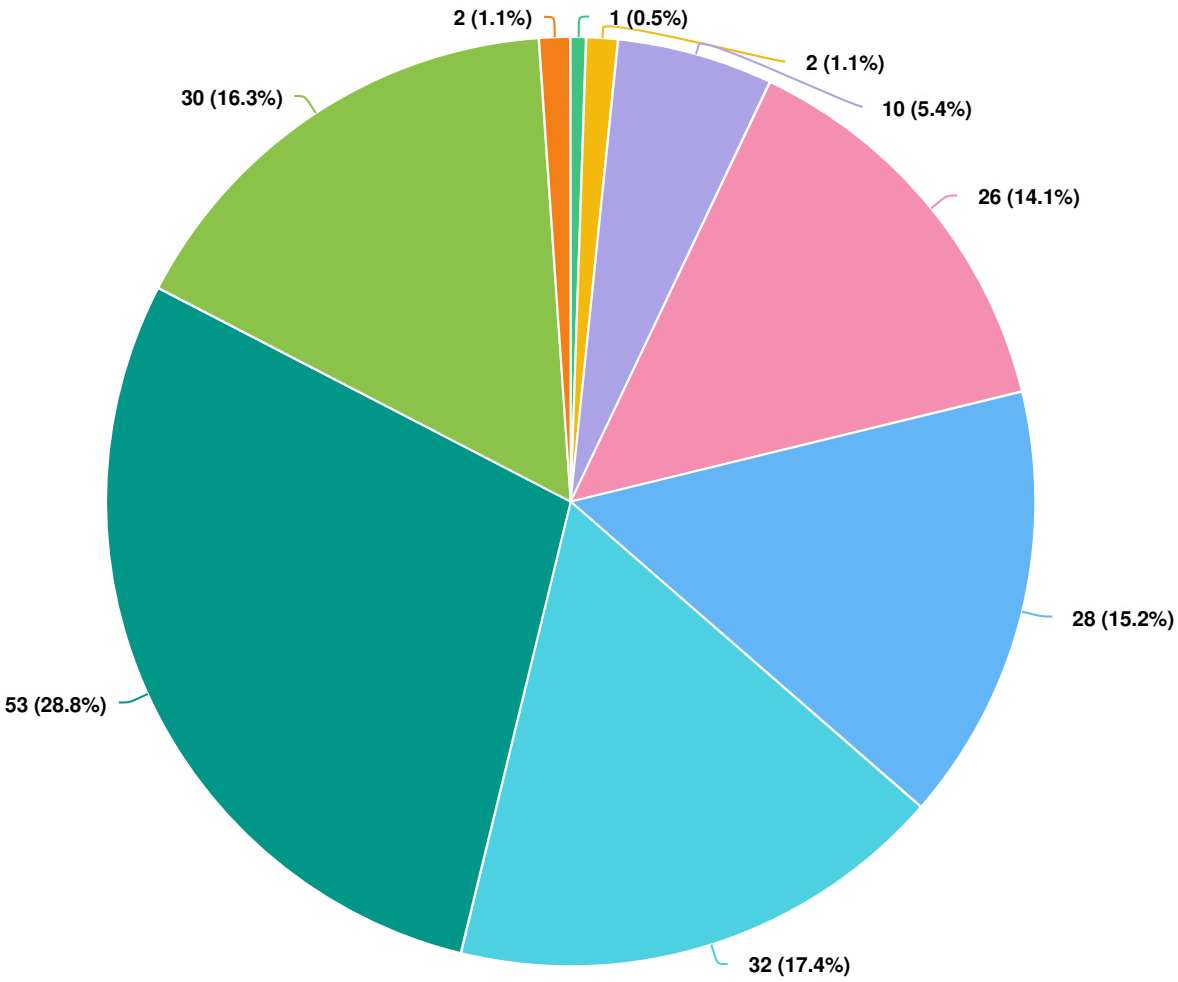
Question options

Roads and transportation infrastructure
Transit infrastructure
Parking infrastructure
Stormwater infrastructure
Recreation, community and cultural facilities
City park infrastructure
Urban forestry
Fire fleet and facilities
Corporate fleet
Corporate (administrative/operations) facilities
Information technology infrastructure

Optional question (173 response(s), 11 skipped)

Question type: Checkbox Question

Please select your age range.



Question options

Under 18 | 18 - 24 years | 25 - 34 years | 35 - 44 years | 45 - 54 years | 55 - 64 years | 65 - 74 years | 75 - 84 years | 85+ years

Optional question (184 response(s), 0 skipped)

Question type: Radio Button Question



City of Burlington

Asset Management Plan 2025

Appendix A-4 Growth Tables

Growth Tables

Table A-4-1: Growth-Related Cumulative Asset Replacement Value

Service Area	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Transportation	$34,892,468	$55,914,707	$71,834,207	$86,139,232	$90,206,857	$94,663,457	$107,481,207	$138,728,207	$178,818,207	$188,705,707
Stormwater	$18,505,147	$20,624,065	$22,067,508	$23,939,662	$25,429,662	$28,583,662	$31,058,662	$32,172,662	$32,172,662	$32,172,662
Recreation, Community and Culture	$22,900,000	$72,900,000	$91,900,000	$178,900,000	$233,400,000	$278,400,000	$328,400,000	$328,400,000	$328,400,000	$328,400,000
Urban Forestry	$37,679,096	$37,679,096	$37,679,096	$37,679,096	$75,358,191	$75,358,191	$75,358,191	$75,358,191	$75,358,191	$113,037,287
Parks	$33,980,374	$39,859,374	$40,259,374	$45,469,756	$50,310,510	$68,538,499	$71,153,231	$75,353,231	$78,234,765	$78,234,765
Corporate Facilities	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Transit	$98,000	$1,187,000	$1,635,000	$1,831,000	$60,826,000	$86,960,000	$86,960,000	$86,960,000	$86,960,000	$86,960,000
Fire	$12,013,603	$27,969,821	$28,019,821	$28,359,821	$42,220,440	$42,255,440	$54,387,003	$55,912,003	$55,912,003	$55,912,003
Parking	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Information Technology	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Corporate Fleet	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Cumulative Increase from Baseline	**$160,068,688**	**$256,134,063**	**$293,395,006**	**$402,318,567**	**$577,751,660**	**$674,759,249**	**$754,798,294**	**$792,884,294**	**$835,855,828**	**$883,422,424**

Table A-4-2: Growth-Related Operating Expenditure Lifecycle Costs

Service Area	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Transportation	$147,271	$235,999	$303,191	$363,568	$380,736	$399,546	$453,646	$585,530	$754,738	$796,471
Stormwater	$19,478	$21,708	$23,227	$25,198	$26,766	$30,086	$32,691	$33,863	$33,863	$33,863
Recreation, Community and Culture	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Urban Forestry	$357,022	$357,022	$357,022	$357,022	$714,045	$714,045	$714,045	$714,045	$714,045	$1,071,067
Parks	$566,179	$664,134	$670,799	$757,614	$838,271	$1,141,984	$1,185,551	$1,255,531	$1,303,543	$1,303,543
Corporate Facilities	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Transit	$4,036	$48,890	$67,343	$75,416	$2,505,311	$3,581,723	$3,581,723	$3,581,723	$3,581,723	$3,581,723
Fire	$143,106	$333,177	$333,773	$337,823	$502,931	$503,348	$647,860	$666,025	$666,025	$666,025
Parking	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Information Technology	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Corporate Fleet	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Annual Operating Investment (Growth)	**$1,237,093**	**$1,660,932**	**$1,755,355**	**$1,916,641**	**$4,968,060**	**$6,370,732**	**$6,615,515**	**$6,836,718**	**$7,053,938**	**$7,452,692**

Table A-4-3: Growth-Related Capital Lifecycle Costs

Service Area	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Transportation	$784,382	$1,256,961	$1,614,831	$1,936,408	$2,027,848	$2,128,032	$2,416,175	$3,118,607	$4,019,829	$4,242,100
Stormwater	$359,082	$400,198	$428,207	$464,535	$493,448	$554,649	$602,675	$624,292	$624,292	$624,292
Recreation, Community and Culture	$430,979	$1,371,981	$1,729,561	$3,366,905	$4,392,597	$5,239,498	$6,180,500	$6,180,500	$6,180,500	$6,180,500
Urban Forestry	$781,299	$781,299	$781,299	$781,299	$1,562,597	$1,562,597	$1,562,597	$1,562,597	$1,562,597	$2,343,896
Parks	$1,361,214	$1,596,720	$1,612,744	$1,821,466	$2,015,381	$2,745,573	$2,850,316	$3,018,563	$3,133,994	$3,133,994
Corporate Facilities	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Transit	$6,094	$73,818	$101,678	$113,867	$3,782,677	$5,407,911	$5,407,911	$5,407,911	$5,407,911	$5,407,911
Fire	$430,932	$1,003,286	$1,005,079	$1,017,275	$1,514,460	$1,515,715	$1,950,878	$2,005,580	$2,005,580	$2,005,580
Parking	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Information Technology	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Corporate Fleet	$-	$-	$-	$-	$-	$-	$-	$-	$-	$-
Annual Capital Investment (Growth)	**$4,153,981**	**$6,484,263**	**$7,273,400**	**$9,501,755**	**$15,789,008**	**$19,153,977**	**$20,971,053**	**$21,918,051**	**$22,934,704**	**$23,938,274**



City of Burlington

Asset Management Plan 2025

Appendix A-5 Proposed LOS

Proposed LOS per Service Area

Table A-5-1: Proposed LOS per Service Area (Years 1 through 10)

Year	Service Area	Backlog Treatment Cost	% Poor or Very Poor (Weighted)	Reinvestment Rate
1	**Total**	**$454,680,807**	**16.74%**	**1.08%**
	Corporate Facilities	$1,881,293	0.19%	1.17%
	Corporate Fleet	$1,593,100	29.72%	7.11%
	Fire	$6,523,138	16.24%	2.42%
	Information Technology	$3,754,000	9.79%	3.11%
	Parking	$7,652,688	14.64%	1.13%
	Parks	$56,490,348	30.30%	2.28%
	Recreation, Community and Culture	$12,248,018	31.04%	0.79%
	Stormwater	$12,856,890	25.80%	0.50%
	Transit	$7,350,032	10.97%	4.90%
	Transportation	$335,718,935	7.83%	0.89%
	Urban Forestry	$8,612,365	4.57%	0.06%
2	**Total**	**$399,835,877**	**14.72%**	**1.08%**
	Corporate Facilities		33.56%	1.86%
	Corporate Fleet		26.16%	8.90%
	Fire	$4,060,996	15.00%	2.25%
	Information Technology	$2,750,000	25.17%	5.20%

Table A-5-1: Proposed LOS per Service Area (Years 1 through 10)

Year	Service Area	Backlog Treatment Cost	% Poor or Very Poor (Weighted)	Reinvestment Rate
	Parking	$6,478,599	13.98%	0.81%
	Parks	$47,351,385	28.04%	1.92%
	Recreation, Community and Culture	$6,526,150	12.60%	0.72%
	Stormwater	$5,916,987	24.47%	0.46%
	Transit	$1,758,032	10.83%	1.86%
	Transportation	$316,656,802	7.99%	0.93%
	Urban Forestry	$8,336,925	4.57%	0.01%
3	**Total**	**$392,890,657**	**15.01%**	**1.37%**
	Corporate Facilities	$423,025	33.56%	1.51%
	Corporate Fleet		25.92%	3.87%
	Fire	$6,853,678	13.79%	2.48%
	Information Technology	$1,925,000	13.06%	6.11%
	Parking	$6,422,599	14.04%	1.16%
	Parks	$40,232,804	26.57%	2.19%
	Recreation, Community and Culture	$18,122,747	12.59%	0.98%
	Stormwater	$2,783,173	24.90%	0.84%
	Transit	$5,564,576	11.03%	3.77%
	Transportation	$302,011,663	9.19%	1.28%

Table A-5-1: Proposed LOS per Service Area (Years 1 through 10)

Year	Service Area	Backlog Treatment Cost	% Poor or Very Poor (Weighted)	Reinvestment Rate
	Urban Forestry	$8,551,392	4.57%	0.93%
4	**Total**	**$372,010,242**	**15.56%**	**1.41%**
	Corporate Facilities		33.56%	1.15%
	Corporate Fleet		44.20%	7.12%
	Fire	$4,615,179	12.75%	3.63%
	Information Technology	$1,925,000	13.06%	6.83%
	Parking	$4,808,078	12.95%	0.59%
	Parks	$34,734,327	28.41%	2.19%
	Recreation, Community and Culture	$9,058,835	11.08%	0.89%
	Stormwater	$3,454,797	26.10%	1.03%
	Transit	$4,299,476	10.41%	3.11%
	Transportation	$304,502,181	10.17%	1.30%
	Urban Forestry	$4,612,370	4.57%	0.93%
5	**Total**	**$371,522,019**	**16.24%**	**1.69%**
	Corporate Facilities		33.56%	0.21%
	Corporate Fleet		47.44%	11.06%
	Fire	$4,845,188	22.13%	3.02%
	Information Technology	$8,675,000	53.78%	6.83%
	Parking	$7,989,733	13.05%	0.39%
	Parks	$32,468,896	27.11%	2.42%

Table A-5-1: Proposed LOS per Service Area (Years 1 through 10)

Year	Service Area	Backlog Treatment Cost	% Poor or Very Poor (Weighted)	Reinvestment Rate
	Recreation, Community and Culture	$3,874,206	9.43%	2.26%
	Stormwater	$2,345,278	28.04%	1.04%
	Transit	$1,664,576	7.88%	3.24%
	Transportation	$305,046,797	10.07%	1.47%
	Urban Forestry	$4,612,345	4.57%	0.93%
6	**Total**	**$359,559,555**	**16.88%**	**1.62%**
	Corporate Facilities		33.96%	0.78%
	Corporate Fleet		54.67%	9.70%
	Fire	$2,179,171	22.83%	3.24%
	Information Technology	$6,475,000	52.25%	10.13%
	Parking	$7,715,270	12.73%	1.44%
	Parks	$28,125,323	25.90%	2.25%
	Recreation, Community and Culture	$1,480,635	9.44%	1.31%
	Stormwater		28.00%	1.11%
	Transit	$1,664,576	19.68%	3.39%
	Transportation	$307,307,212	10.73%	1.45%
	Urban Forestry	$4,612,367	4.57%	0.93%
7	**Total**	**$369,613,197**	**17.23%**	**1.86%**
	Corporate Facilities		33.98%	0.31%
	Corporate Fleet		42.16%	12.85%

Table A-5-1: Proposed LOS per Service Area (Years 1 through 10)

Year	Service Area	Backlog Treatment Cost	% Poor or Very Poor (Weighted)	Reinvestment Rate
	Fire	$2,179,171	22.67%	1.68%
	Information Technology	$6,475,000	53.94%	10.58%
	Parking	$6,645,724	12.09%	0.08%
	Parks	$24,286,402	27.11%	2.20%
	Recreation, Community and Culture	$2,243,959	8.85%	0.94%
	Stormwater		27.26%	1.10%
	Transit	$1,778,576	19.98%	4.99%
	Transportation	$321,391,998	12.31%	2.09%
	Urban Forestry	$4,612,367	4.57%	1.86%
8	**Total**	**$348,351,959**	**17.02%**	**2.03%**
	Corporate Facilities		33.98%	0.17%
	Corporate Fleet		55.06%	10.45%
	Fire	$2,179,171	23.98%	4.40%
	Information Technology	$4,000,000	48.67%	16.44%
	Parking	$6,847,261	12.09%	0.08%
	Parks	$21,666,061	26.32%	3.05%
	Recreation, Community and Culture	$1,065,101	10.07%	1.26%
	Stormwater		26.48%	1.13%
	Transit	$1,778,576	8.29%	5.04%
	Transportation	$310,203,424	12.71%	1.96%

Table A-5-1: Proposed LOS per Service Area (Years 1 through 10)

Year	Service Area	Backlog Treatment Cost	% Poor or Very Poor (Weighted)	Reinvestment Rate
	Urban Forestry	$612,364	4.57%	1.86%
9	**Total**	**$379,253,808**	**16.91%**	**2.24%**
	Corporate Facilities		33.96%	0.85%
	Corporate Fleet		61.05%	15.70%
	Fire		22.87%	4.11%
	Information Technology	$22,195,000	74.34%	16.14%
	Parking	$8,835,949	12.34%	0.08%
	Parks	$18,875,290	25.23%	3.32%
	Recreation, Community and Culture	$821,400	10.08%	1.26%
	Stormwater	$3,625,087	23.89%	1.21%
	Transit	$3,568,876	7.68%	5.05%
	Transportation	$320,719,843	13.13%	2.30%
	Urban Forestry	$612,363	4.57%	1.86%
10	**Total**	**$380,489,447**	**17.40%**	**2.72%**
	Corporate Facilities		33.96%	0.22%
	Corporate Fleet		42.72%	10.89%
	Fire	$3,791,050	24.11%	10.95%
	Information Technology	$21,595,000	62.81%	19.10%
	Parking	$8,701,830	12.33%	0.08%
	Parks	$19,678,953	23.97%	3.46%

Table A-5-1: Proposed LOS per Service Area (Years 1 through 10)

Year	Service Area	Backlog Treatment Cost	% Poor or Very Poor (Weighted)	Reinvestment Rate
	Recreation, Community and Culture	$2,312,739	10.07%	1.29%
	Stormwater		23.25%	1.54%
	Transit	$4,393,576	30.36%	10.33%
	Transportation	$319,498,306	13.75%	2.52%
	Urban Forestry	$517,993	3.47%	1.86%



City of Burlington

Asset Management Plan 2025

Appendix A-6 20 Year Investment Table

Annual Investments Comparing Planned with Recommended SOGR

Table A-6-1: Annual Investments Comparing Planned with Recommended SOGR (Year 1 to 20)

Year	Planned SOGR Investment	Recommended SOGR Investment
1	$77,466,000	$77,466,000
2	$71,626,000	$71,626,000
3	$74,028,000	$97,733,000
4	$78,764,000	$100,851,000
5	$83,013,000	$121,066,000
6	$93,286,000	$115,810,000
7	$84,532,000	$133,027,000
8	$97,141,000	$145,260,000
9	$100,624,000	$160,270,000
10	$108,035,000	$194,801,000
11	$110,196,000	$199,013,000
12	$112,400,000	$178,139,000
13	$114,648,000	$147,956,000
14	$116,941,000	$174,123,000
15	$119,279,000	$170,083,000
16	$121,665,000	$205,136,000

A-6 20 Year Investment Table

Year	Planned SOGR Investment	Recommended SOGR Investment
17	$124,098,000	$153,500,000
18	$126,580,000	$138,396,000
19	$129,112,000	$163,979,000
20	$131,694,000	$152,407,000
Total	$2,075,128,000	$2,900,642,000



City of Burlington

Asset Management Plan 2025

Appendix B



City of Burlington

Asset Management Plan 2025

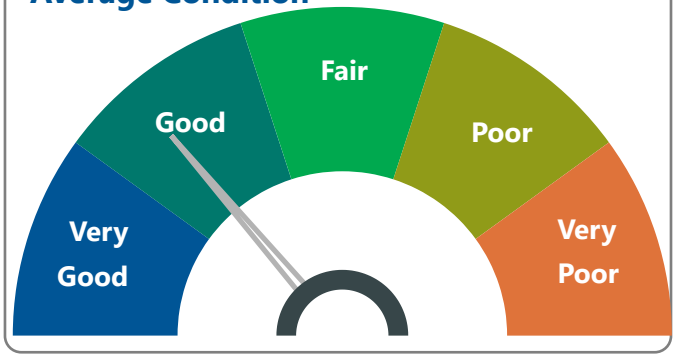
Appendix B-1 Transportation

State of Transportation Infrastructure

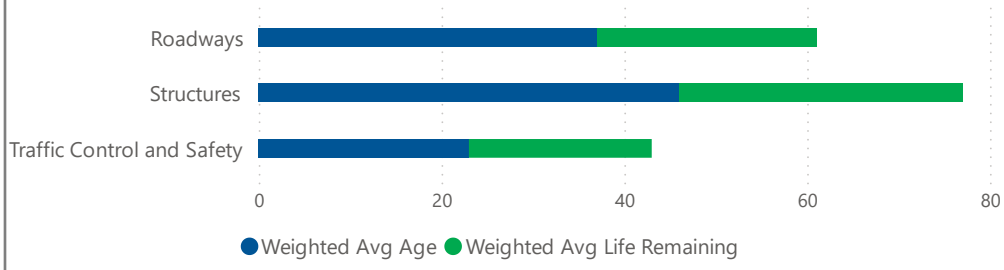
The City of Burlington is committed to providing a safe and reliable transportation network that supports all modes of transportation.

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$2.73bn	Good	**Low**	Roadways	A-	38 | 64 years
			Structures	A	
			Traffic Control and Safety	C	

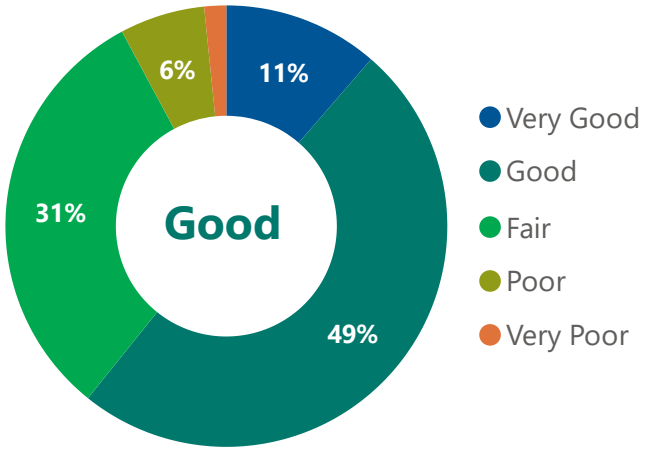
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

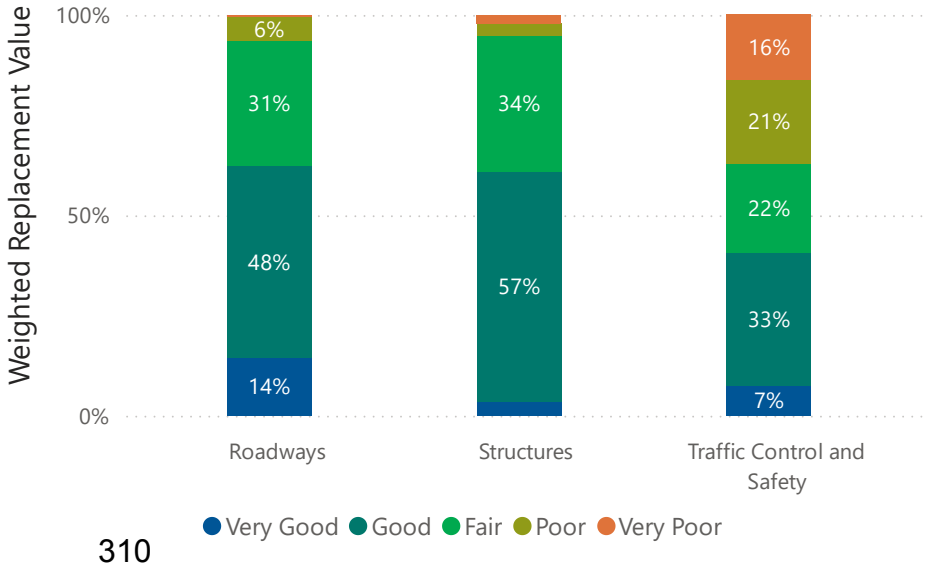


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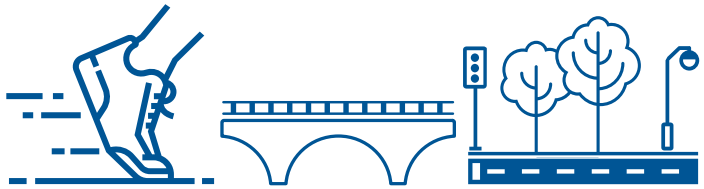
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Transportation

Transportation infrastructure, including Roadways, Structures, and Traffic Control and Safety assets, plays an integral role in the daily life of the City's citizens, promoting business, creating employment, providing social opportunities, creating markets and saving lives. As such, efficient transportation infrastructure is crucial to building a strong economy and improving the quality of life for citizens.

Transportation infrastructure makes up the largest group of assets in terms of quantity and overall replacement cost. State of Good Repair (SOGR) needs will be planned to ensure long-term asset sustainability focused on user safety and reliability. Future Transportation infrastructure growth requirements will be guided by the City's Infrastructure Mobility Plan (IMP). The IMP will aim to provide:

- A wider range of transportation options, regardless of age, means or ability.
- The efficient transportation of more people with compact modes of transportation (such as buses, bicycles, and walking).
- A transportation system that is well-connected to other Regions.
- Fast, reliable and frequent transit.
- The improvement of facilities for cyclists and pedestrians.

1.0 State of Local Infrastructure

An efficient, dependable, and safe transportation network is a fundamental expectation of many members of the community. The City's portfolio of infrastructure assets for Transportation Services is valued at over $2.7 billion. This value comprises roadway assets valued at $1.9 billion, structure assets valued at $678 million, and traffic control and safety assets valued at $143 million.

Assets pertaining to the Roadways category include Local Streets, Active Transportation including sidewalks, pathways and cycling infrastructure, Primary and Secondary Collectors, and Arterials, with assets including the road base, drainage, asphalt, curb and gutter, islands, street furniture and others.

Assets pertaining to the Structures category include Bridges, Major Road Culverts, Noise Walls, and Retaining Walls.

To meet the City's transportation needs, the City also owns and operates many Traffic, Control and Safety infrastructure, with assets including Streetlights, Traffic Signs, Traffic Signals, and Guiderails.

The total replacement value for the Transportation infrastructure is $2,726.5 million, the average age is 38 years, and the average OSI condition is Good. See See **Table 1** for the asset inventory and valuation for each asset class as well as average age, average service life and average OSI condition.

Table 1: Asset Inventory and Valuation – Transportation

Asset Class	Asset Categories	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Roadways	Pedestrian Network	817 km	$167.8 M	32	60	Good
Roadways	Roads	1,600 lane km	$1,736.8 M	37	60	Good
Structures	Bridges	47	$284.0 M	52	80	Good
Structures	Major Road Culverts	107	$365.2 M	42	75	Good
Structures	Noise Walls	31	$11.9 M	32	60	Poor
Structures	Retaining Walls	199	$17.4 M	32	60	Fair
Traffic Control and Safety	Guiderails	22 km	$15.9 M	15	25	Fair
Traffic Control and Safety	Signs	34,999	$10.7 M	N/A	10	Good
Traffic Control and Safety	Streetlights	26,718	$91.7 M	27	48	Fair
Traffic Control and Safety	Traffic Signals	167	$25.1 M	27	58	Good

These replacement values were developed using historic construction costs and a standardized costing index.

Asset condition ratings are based on the Overall Service Index (OSI) for each asset. The OSI for roadways is based on both the age of the roadway and the Pavement Quality Index (PQI), which is calculated from recent road inspections observing the type and quantity of pavement distresses. The OSI for bridges and culverts is based on both the age of the structure and the Bridge Condition Index (BCI), which is determined by assessments completed every two years by City-retained consultants. The OSI for traffic control and safety assets is based on age or condition assessments, depending on the type of asset.

2.0 Levels of Service

O. Reg. 588/17 requires specific reporting on community and technical levels of service (LOS) for Transportation infrastructure, and these are noted in the following tables with an asterisk. In addition to the required reporting, the City has identified Operational Levels of Service, which is also reported. These metrics define the scope of the service delivered by Transportation infrastructure and the current performance of these assets.

The City has selected three standardized corporate LOS metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2025) for the Transportation service area.

Table 2: Standardized Corporate LOS Metrics – Current (2024) – Transportation

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	0.89%
Technical LOS	SOGR Backlog	$335,719,000
Community LOS	% Poor or Very Poor	7.83%

2.1 Levels of Service – Roadways

The City's roadway network includes 1,600 lane kilometres of roads and 817 km of pedestrian network. For the Community Levels of Service, see the map of the connectivity of the road network in **Figure 1**, which illustrates the scope of the service and the quality of the network presented in **Table 3**. The Technical Levels of Service are presented in **Table 4**, identified by the City.

Figure 1: Map of the Road Network in the City and the Level of Connectivity*



Table 3: Community Levels of Service – Roadways

PQI Condition Rating	Quality of Roads (photo)*	Current Performance 2024
Very Good PQI 80 - 100		39.9%
Good PQI 67 – 79.9		25.9%
Fair PCI 55 – 66.9		13.18%
Poor PCI 35 – 54.9		15.72%
Very Poor PCI 0 – 34.9		5.31%

* as required in O. Reg. 588/17 Table 4 (Roads)

Table 4: Technical Levels of Service – Roadways

Service Attribute	Performance Metric	Current Performance 2024
Scope	Number of lane-kilometres/km^2*	Arterial 1.92 Collector 1.59 Local 4.19
Reliability	Percentage of roads in Very Poor or unknown condition	5.31%
Quality	For paved roads in the municipality, the average pavement condition index value. *	72.6%
Quality	For unpaved roads in the municipality, the average surface condition (e.g., excellent, good, fair, or poor). *	N/A
Quality	Percentage of roads and sidewalks that meet the target condition level of Good or Very Good	63.31%
Scope	Percentage of spine cycling network completed, as identified in the IMP	27%
Quality	Percentage of urban class street network with a safe pedestrian facility	75.24%

* as required in O. Reg. 588/17 Table 4 (Roads)

2.2 Levels of Service – Structures

The City's transportation structures include 47 bridges, 107 major road culverts, 31 noise walls and 199 retaining walls. For the Community Levels of Service, see **Table 5,** which presents the quality of bridges and the current performance. The Technical Levels of Service are presented in **Table 6,** which is identified by the City**.**

Table 5: Community Levels of Service – Structures

BCI Condition Rating	Quality of Bridge (photo)*	Current Performance 2024
Very Good BCI 86 - 100		3.23%
Good BCI 71 – 85.9		66.24%
Fair BCI 61 – 70.9		27.87%

BCI Condition Rating	Quality of Bridge (photo)*	Current Performance 2024
Poor 41 – 60.9		2.66%
Very Poor 0 – 40.9		0%

* as required in O. Reg. 588/17 Table 5 (Bridges and Culverts)

Table 6: Technical Levels of Service – Structures

Service Attribute	Performance Metric	Current Performance 2024
Quality	Percentage of bridges and major culverts that meet the target condition level of Good or Very Good	61.66%
Reliability	Percentage of bridges and major culverts in Very Poor or unknown condition	0.29%
Quality	Percentage of bridges requiring minor or major repairs within the next 10 years	23.38%
Quality	Percentage of bridges requiring replacement within the next 10 years	7.79%
Scope	Percentage of bridges in the municipality with loading or dimensional restrictions. *	0%
Quality	For bridges in the municipality, the average bridge condition index value. *	70.55%
Quality	For structural culverts in the municipality, the average bridge condition index value. *	69%

* as required in O. Reg. 588/17 Table 5 (Bridges and Culverts)

2.3 Levels of Service – Traffic Control and Safety

The City's traffic control and safety infrastructure includes 22 km of guiderails, 34,999 signs, 26,718 streetlights and 167 traffic signals. The Technical Levels of Service are presented in **Table 7,** which includes the Operational Levels of Service identified by the City.

Table 7: Technical Levels of Service – Traffic Control and Safety

Service Attribute	Performance Metric	Current Performance 2024
Quality	Percentage of streetlights that meet the target condition level of Good or Very Good	47.58%
Quality	Percentage of traffic assets (signs, signals) that meet the target condition level of Good or Very Good	30.96%
Reliability	Percentage of traffic assets (signs, signals, lighting, guiderails) in Very Poor or unknown condition	16.22%

3.0 Asset Management Strategy

Table 8: Lifecycle Activities – Roadways

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	**Roadways:** Road Inspections per the Minimum Maintenance Standards (MMS) Sweeping Additional maintenance as per findings of MMS. Snow and ice removal maintenance - sanding and icing Road Clearing Pothole filling and curb repairs **Pedestrian Network:** Inspection as part of MMS Pedestrian Network clearing and sweeping	Deficiencies are not identified through patrols. Increased lifecycle costs if maintenance is done improperly or not as scheduled. It may contribute to premature asset failure service disruptions or pose health and safety risks. Customer dissatisfaction with road congestion, road closures and other disruptions. Liability due to failures or response times. Noncompliance with minimum maintenance standards. Aesthetic issues.
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	**Roadways:** Surface Treatment (Rural Roads) Localized Resurfacing - Minor mill and pave Minor Reconstruction Resurfacing Crack seal **Pedestrian Network:**	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Grinding Spot repairs Asphalt Patching Partial segment replacement Mud Jacking	Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled. Changes to asset use, as well as modernizing systems and adjusting to increasing levels of customer and employee service.
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option	**Roadways:** Major Reconstruction **Pedestrian Network:** Full block replacements Replacements for accessibility (tactile plates, ramps, etc.) Replacement for utilities and developments As part of construction projects	Delays in construction projects may result in health and safety risks, higher costs, longer service disruption and customer dissatisfaction.
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	**Roadways:** Integrated Mobility Plan (in development) Traffic Studies/Counts Monitoring active transportation volumes Visual inspections by road patrol Pavement Condition Assessment Safety/Collision reviews (i.e., if assets are being repeatedly struck) Pedestrian Network: Annual MMS inspections Integrated Mobility Plan Connectivity review as part of capital projects	Asset deterioration is over or underestimated. Inaccurate growth numbers and estimation of funding.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Visual inspections by road patrol Official Plan	
Expansion / Service Enhancements Planned activities to improve an asset's capacity, quality, and system reliability	**Roadways:** Official plan targets Master Plan/Integrated Mobility Plan MTSA (Major Transit Station Area) Studies Development requirements/requests Updated pavement and materials design processes Improvements or new infrastructure because of Regional Ministry of Transportation/Rail requirements Health and Safety requirements **Pedestrian Network:** As required through development As identified through the connectivity review and capital project development Targets from the official plan New City infrastructure because of Regional Bridges/MTO/Rail Based on accessibility requirements during replacement or at intersections Sidewalks that were not able to be built during development	Growth activities are delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth. Master Plans may overestimate or underestimate required road expansions to accommodate for growth. Increased lifecycle costs. Health and Safety Improper renewal/rehabilitation can lead to decreased asset life, premature asset failure, unplanned failures, and service outages. Road disruption and congestion.
Disposal Activities Activities associated with disposing of an asset once it	**Roadways:** Asphalt Re-Use as backfill from milling	Improper disposal can lead to environmental impacts and expenses.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
has reached the end of its estimated service life or is otherwise no longer needed by the municipality	Re-use of asphalt in granular A and B in reconstruction Contaminated soils disposal **Pedestrian Network:** Disposed during construction	

Table 9: Lifecycle Activities – Structures

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	**Bridges and Culverts:** Expansion joint cleaning Culvert and grate cleaning and debris removal Inspections Waterway clearing Deck drain cleaning Erosion control repairs Retaining Walls and Noise Walls: Checked for damage as part of maintenance management system (MMS) Capping repairs or minor repairs	Deficiencies are not identified through inspections. Increased lifecycle costs if maintenance is done improperly or not as scheduled. It may contribute to premature asset failure, service disruptions or pose health and safety risks. Customer dissatisfaction with bridge closures and other disruptions.
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	**Bridges and Culverts:** Deck resurfacing and waterproofing Minor Bridge/Culvert Rehabilitation Major Bridge/Culvert Rehabilitation Capital Bridge/Culvert Repairs **Retaining Walls and Noise Walls:** Adjustments to meet current design standards Noise wall panel repair and replacements Repairs when damaged or defects	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled. Changes to asset use, modernizing systems and adjusting to increasing levels of customer and employee service.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option	**Bridges and Culverts:** Bridge/Culvert Replacement **Retaining Walls and Noise Walls:** Replacements of retaining walls and noise walls based on condition assessments, project coordination, and updated design standards Replaced if the damaged extension is considerable or defects	Risk of road collapse if the deteriorated culvert is not replaced, increasing risk to public safety, transportation. Delays in construction projects may result in health and safety risks, higher costs, longer service disruption and customer dissatisfaction.
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	**Bridges and Culverts:** Environmental Assessments and/or capacity studies OSIM Inspections and/or additional investigations Review of all components (code compliance) Visual inspections by road patrol Integrated Mobility Plans **Retaining Walls and Noise Walls:** OSIM inspections on walls Visual inspections by road patrol Noise studies (for noise walls)	**All Assets:** Asset deterioration is over or underestimated. Inaccurate growth numbers and estimation of funding.
Expansion / Service Enhancements Planned activities to improve an asset's capacity,	**Bridges and Culverts:** Requests from Council/Community (Typically AT structures and grade separations)	Growth activities are delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
quality, and system reliability	Sidewalk and structure modifications, as identified through the IMP Adjustments due to capacity requirements Addition of lighting, beacons, and signals New City infrastructure due to Regional Bridges/MTO/Rail **Retaining Walls and Noise Walls:** New roads/road reconstruction Installation of noise walls Infill development can trigger new noise walls Based on individual studies/hazards	Master Plans may overestimate or underestimate required road expansions to accommodate for growth.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	**Bridges and Culverts:** Through construction **Retaining Walls and Noise Walls:** Dispose during construction or replacement as needed	Improper disposal can lead to environmental impacts and expenses.

Table 10: Lifecycle Activities – Traffic Control and Safety

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	**Streetlights, Traffic Signals, Signs and Guard Rails:** Issues reported and repaired as part of MMS Defective signs/signals/lights Reports/complaints Accident reports Annual sign retro-reflectivity review (MMS) Annual Streetlight night patrols (MMS) Periodic patrols of bollards/flex posts Downtown Pole painting Traffic Signal inspections (MMS) Signal conflict monitor testing (MMS) Signal System outputs Street light Pole condition assessments	Deficiencies are not identified through inspections. Increased lifecycle costs if maintenance is done improperly or not as scheduled. May contribute to premature asset failure, service disruptions, or pose health and safety risks. Customer dissatisfaction with road congestion, road closures and other disruptions. Aesthetic concerns (i.e., pole painting)
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	**Streetlights, Traffic Signals, Signs and Guard Rails:** Replacement of signal components (Controller, Heads, Wiring, Poles) Replacement of streetlighting (LED fixtures, decorative lighting) Annual pavement marking retrace Traffic signals/streetlighting renewal budgets	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled. Health and safety risks due to missing or falling signage or malfunctioning streetlights /signals.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
		Changes to asset use, modernizing systems and adjusting to increasing levels of customer and employee service.
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option	**Streetlights, Traffic Signals, Signs and Guard Rails:** When damaged or when retro reflectivity does not meet requirements Utility relocation Changes to legislation Replacement as part of reconstruction or other projects (i.e., roads project)	Delays in construction projects may result in health and safety risks, higher costs, longer service disruption and customer dissatisfaction. Health and safety risks due to missing or falling signage or malfunctioning streetlights. Delayed traffic signal replacements will lead to increased traffic congestion at intersections and further service disruption.
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	**Streetlights, Traffic Signals, Signs and Guard Rails:** Retroreflectivity Assessment Program Visual inspections by road patrol Traffic signalization and optimization studies	Asset deterioration is over or underestimated. Inaccurate growth numbers and estimation of funding. Energy consumption and costs are not reduced. Inefficient signal timing leading to traffic congestion at intersections. Incorrectly updated signal timings may pose health and safety risks.
Expansion / Service Enhancements Planned activities to improve an asset's capacity,	**Streetlights, Traffic Signals, Signs and Guard Rails:** Added based on studies or new development	Growth activities are delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
quality, and system reliability	Proper budgeting through capital works for operating and maintenance of new infrastructure	Master Plans may overestimate or underestimate required road expansions to accommodate for growth. Health and safety risks due to lack of signage or proper lighting.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	**Streetlights, Traffic Signals, Signs and Guard Rails:** Dispose during construction or replacement as needed	Improper disposal can lead to environmental impacts and expenses.

4.0 Risk

4.1 Internal Risk

Risk, as discussed in Section 5, is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure x Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

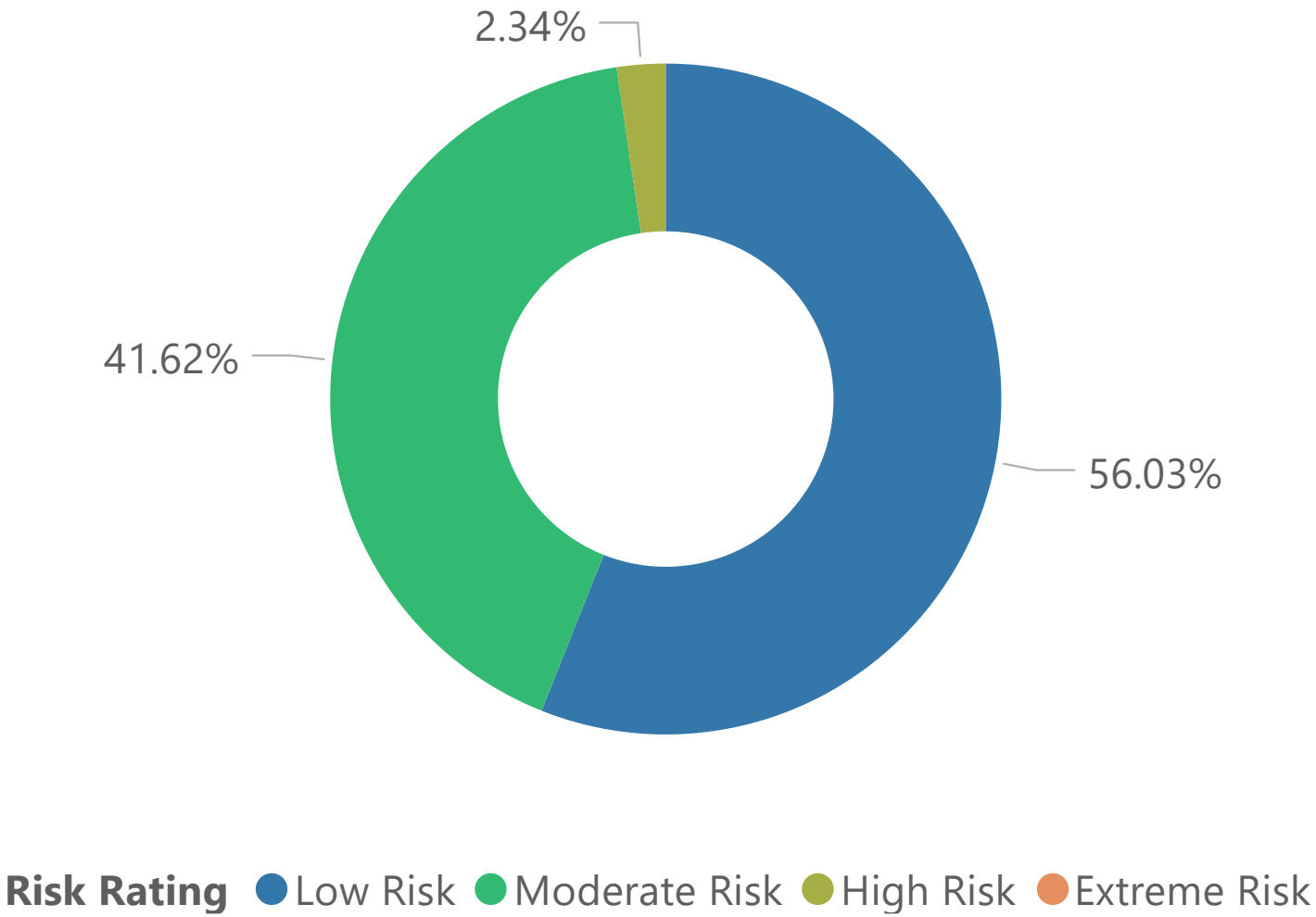
The triple bottom line **consequence of failure** factors are presented in **Table 11** for social, financial and environmental consequences.

Table 11: Consequence of Failure Factors – Transportation

Social	Financial	Environmental
• Road Classification • Route criticality • Asset has regulated inspection requirements • Within the CH Regulation Limit	• Replacement Value	• Proximity to water

See **Figure 2,** which presents the percentage of assets (weighted), showing the majority of assets with risk scores of low to moderate, only 2.34% with high risk and none with extreme risk.

Figure 2: Risk Rating by Replacement Value – Transportation



4.2 External Risk

The following external risks have been identified for the Transportation service area:

- Accelerated asset degradation due to climate change (heavy snow/precipitation, freeze/thaw events, heat waves, etc.);
- Inflation, tariffs;
- Decreased asset capacity/performance due to growth; and
- Demand drivers for multi-modal transportation.



City of Burlington

Asset Management Plan 2025

Appendix B-2 Stormwater

State of Stormwater Infrastructure

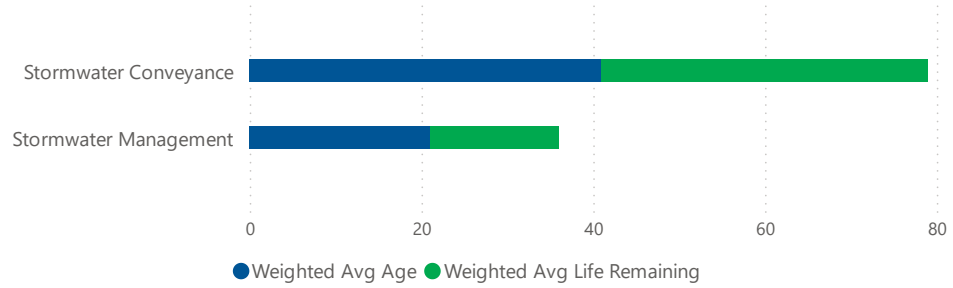
The City of Burlington is committed to providing stormwater infrastructure.

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$1.49bn	Good	**Low**	Stormwater Conveyance	B	37 | 71 years
			Stormwater Management	B-	

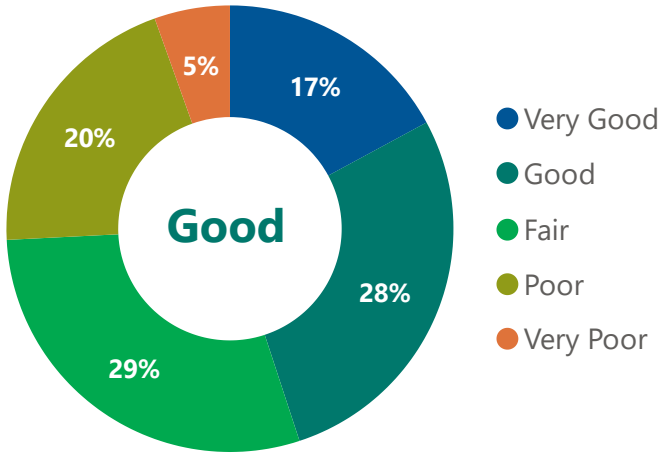
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

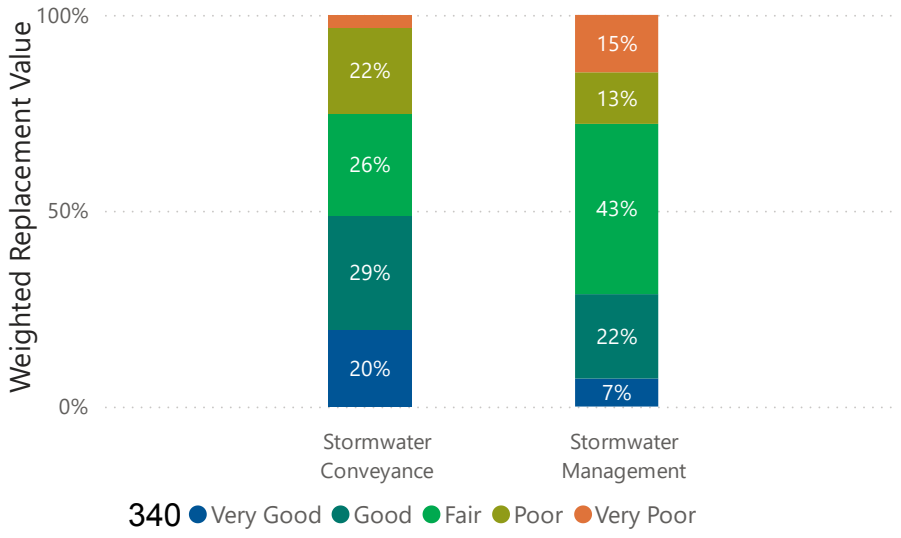


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Stormwater

The City of Burlington's Stormwater infrastructure functions to collect, convey, treat and discharge stormwater in order to protect the public and the City's natural and built environments. Stormwater, derived from rain and snowmelt, enters the storm system through catch basins, creeks, ditches, and other stormwater channels. The Stormwater system drains stormwater away from buildings, roads and impervious surfaces.

Due to the increased intensity and frequency of storm events as a result of climate change, stormwater management is becoming increasingly crucial. Higher precipitation rates will reduce the capacity of the surrounding area to retain stormwater. Further, if the stormwater infrastructure is not well maintained, appropriately sized, or in a state of good repair to accommodate these extra flows, this can increase the risk of overland flooding.

A stormwater master servicing plan has currently been initiated. The outcome of this plan will be a critical input into future AMPs. The identification of all existing and proposed stormwater infrastructure (conveyance and management) will feed directly into the AMP inventory, improving accuracy and completeness.

As the City continues to grow, more emphasis will be placed on Stormwater Management Infrastructure to manage changes in social, economic and environmental expectations.

1.0 State of Local Infrastructure

The City operates and maintains an extensive network of Stormwater infrastructure and equipment, divided into two asset categories – Stormwater Management and Stormwater Conveyance. The Stormwater Management network is comprised of open conveyance, stormwater management facilities and minor treatment equipment such as oil/grit separators. The Stormwater Conveyance network consists of storm sewers, minor culverts, and their associated structures, such as catch basins and maintenance holes.

The total replacement value for the Stormwater infrastructure is $1,488.9 million, the average age is 37 years, the average service life is 71 years, and the average OSI condition is Good. See **Table 1** for the asset inventory and valuation for each asset class and asset type, as well as average age, average service life and average OSI condition.

Table 1: Asset Inventory and Valuation – Stormwater

Asset Class	Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Stormwater Conveyance	Catch basins, Maintenance Holes and Structures	27,962	$191.9 M	40	80	Good
	Minor Road Culverts	2,756	$107.6 M	37	75	Good
	Storm Sewer Pipes	851 km	$901.9 M	42	80	Good
Stormwater Management	Minor Treatment	20	$1.3 M	11	56	Very Good
	Open Conveyance	various	$91.8 M	35	68	Fair
	Stormwater Management Facilities	30	$194.4 M	14	19	Fair

These replacement values were developed using historic construction costs and a standardized costing index.

Asset condition ratings are based on the Overall Service Index (OSI) for each asset. The OSI for stormwater is based on the age of the asset. Stormwater infrastructure condition is inferred by the age of the asset and its expected useful life.

1.1 Green Infrastructure and Natural Asset Management

The City recognizes the importance of natural and green assets that provide stormwater benefits such as flood control, erosion protection, and water quality protection. These include, but are not limited to:

- Parks and naturalized areas;
- Trees and forests, and
- Beaches and shoreline protection.

In 2024, the City began developing a Natural Assets Roadmap that will assess our current natural asset management practices and identify opportunities to improve or implement policies and procedures that will further enhance our knowledge and management of City-owned natural assets.

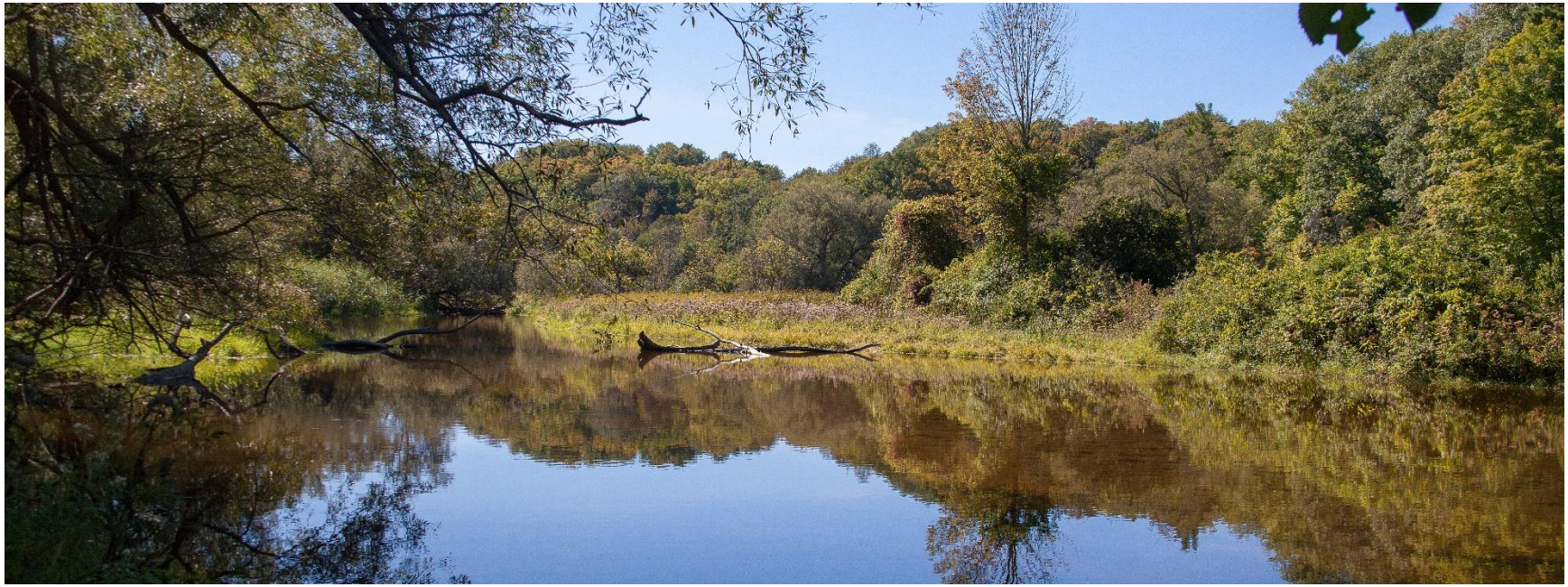
The City owns and maintains:

- 3.2 km of shoreline protection;
- 30 stormwater management facilities (ponds);
- 1.5 km of natural sand beach (not included within this AMP);
- 93 km of creeks, including 10 km of erosion and flood protection infrastructure, and
- 1 rain garden.

Urban forestry and the park's natural assets are discussed in **Appendix B-4** and **Appendix B-5,** respectively.

This iteration of the AMP quantifies and forecasts the capital needs required to maintain the City's assets in a state of good repair. This is an approach that aligns well with engineered or grey infrastructure but can be challenging for natural or green assets. Other municipal Natural Asset Management Plans have utilized an alternative approach and considered the costs of natural asset restoration in their natural asset management.

As the City continues its development of a Natural Assets Roadmap, an enhanced approach to including natural assets in its Corporate Asset Management Plan will be considered in future AMPs.



2.0 Levels of Service

O. Reg. 588/17 requires specific reporting on community and technical levels of service for Stormwater infrastructure and these are noted in the following table with an asterisk. In addition to the required reporting, the City has identified Operational Levels of Service, which is also reported. These metrics define the scope of the service delivered by Stormwater infrastructure and the current performance of these assets.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2025) for the Stormwater service area.

Table 2: Standardized Corporate LOS Metrics – Stormwater

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	0.50%
Technical LOS	SOGR Backlog	$12,857,000
Community LOS	% Poor or Very Poor	25.80%

The City's stormwater conveyance includes 851 km of storm sewer pipes, 2,756 minor road culverts, and 27,962 catch basins, maintenance holes and structures. The Community Levels of Service are presented in **Table 3,** and the Technical Levels of Service are presented in **Table 4**.

Table 3: Community Levels of Service – Stormwater

Table Notes

1. This value denotes the percentage of parcels that are considered to be located beyond the 100-year floodplain, as delineated by the Conservation Halton's Regulatory Limit.
2. This value denotes the percentage of the built stormwater conveyance system that was constructed after 1977, when the City completed and adopted its original Stormwater Management Design Manual, which included sizing guidelines to ensure stormwater sewer conveyance met 5-year storm flows.

Service Attribute	Performance Metric	Current Performance (2024)
Scope	Description of the user groups or areas of the municipality that are protected from flooding, including the extent of the protection provided by the municipal stormwater management system*	The majority of the stormwater management system throughout the City provides protection from 5-year storm flows[1]

* as required in O. Reg. 588/17 Table 3 (Stormwater Management Assets)

Table 4: Technical Levels of Service – Stormwater

Service Attribute	Performance Metric	Current Performance (2024)
Scope	The percentage of properties in the municipality resilient to a 100-year storm*	79.10%[1]
Scope	Percentage of the municipal stormwater management system resilient to a 5-year storm*	60.93%[2]
Quality	Percentage of stormwater conveyance assets in Good or Very Good condition	74.47%
Quality	Percentage of stormwater management assets in Good or Very Good condition	72.17%
Reliability	Percentage of mainline storm sewer network cleaned and inspected with CCTV annually	10.18%
Reliability	Catch basin cleaning frequency	25%
Reliability	Percentage of Minor Culverts in Very Poor or Unknown Condition	25.39%

* as required in O. Reg. 588/17 Table 3 (Stormwater Management Assets)

3.0 Asset Management Strategy

Table 5: Lifecycle Activities – Stormwater

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	**Storm Sewer Pipes and culverts:** Condition assessments either through CCTV inspection or manned entry Storm Sewer Flushing and Cleaning Spot repairs, CB leads/replacements, minor capital Lateral small-scale repairs Small culvert repair Storm Sewer Structures: Catch basin Cleaning MACP inspections on MHs Catch basin repairs and adjustments	Erosion and/or flooding. Overland flow during stormwater events. Contaminants and water quality issues. Effects on other City infrastructure and services (i.e. roads, transit routes, facilities, etc.). Access issues. Inability to identify constraints or issues within the system.
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	**Storm Sewer Pipes:** Storm Sewer Spot Repair Storm Sewer Spot Repair Extended The lining of pipe or culvert Storm Sewer Structures: MH adjustments	Renewal/rehab activities may not extend asset life as much as expected, leading to unpredictable asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are not completed as scheduled or completed incorrectly.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option	**Storm Sewer Pipes:** Storm Sewer Replacement Culvert Replacement Storm Sewer Structures: Manhole replacement	Delays in construction projects may result in higher costs, longer service disruption, potential flooding, road closures, customer dissatisfaction and health and safety risks.
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	**Storm Sewer Pipes:** Stormwater design guidelines Watershed studies and modelling Storm Sewer Structures: Stormwater design guidelines Watershed studies and modelling Condition assessment through CCTV inspection	Asset deterioration is over or underestimated. Increased demand and required capacity on the stormwater system. Potential risk of private and/or public flooding. Lack of coordination between local municipalities and other services may cause construction delays, causing increased public disruption, construction costs and replacing assets before the end of service life.
Expansion / Service Enhancements Planned activities to improve an asset's capacity, quality and system reliability	**Storm Sewer Pipes:** Pipe upsizing Installation of a new storm system in an existing area Storm Sewer Structures: MH upsizing aligned with upsizing of pipes CB – adding additional	Capacity increase projects are delayed or cancelled, resulting in the system being unable to accommodate increased flow due to population and employment growth. Incorrect sizing can cost more money to maintain and potentially lead to operational issues. Storm conveyance capacity constraints.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	**Storm Sewer Pipes:** Removals through standard construction practices Storm Sewer Structures: Removals through standard construction practices	Inadequate disposal of contaminants and materials.

4.0 Risk

4.1 Internal Risk

As discussed in Section 5, Risk is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure X Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

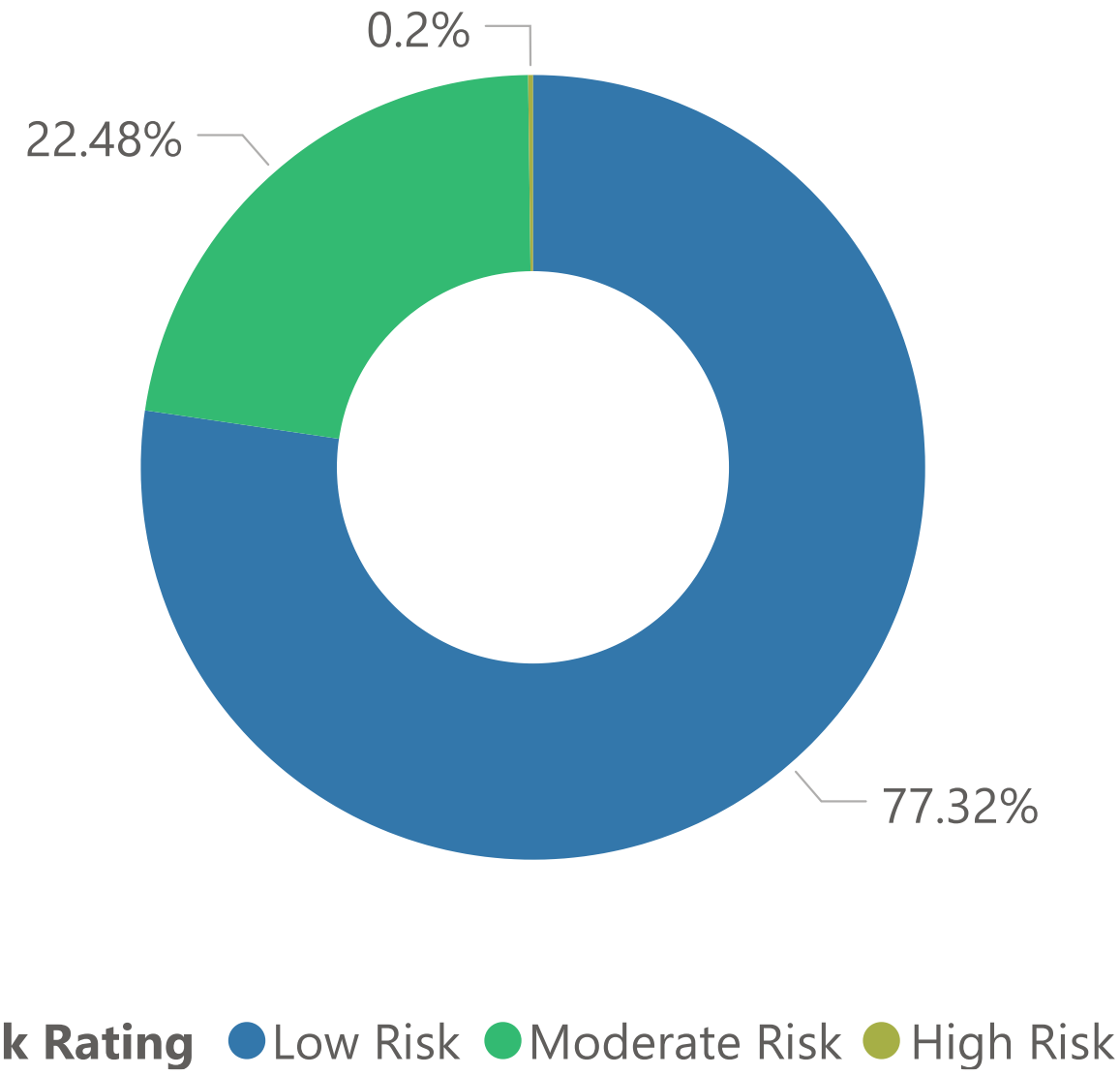
The triple bottom line **consequence of failure factors** are presented in **Table 6** for social, financial and environmental consequences.

Table 6: Consequence of Failure Factors – Stormwater

Social	Financial	Environmental
• Asset Road Classification • Emergency route criticality • Storm pipe diameter	• Replacement Value	• Within CH and NEC Regulation limit

The overall risk profile, shown in **Figure 1,** is Low for Stormwater, with 77% of assets assigned a Low-Risk rating.

Figure 1: Risk Rating by Replacement Value – Stormwater



4.2 External Risk

The following external risks have been identified for the Stormwater service area:

- Accelerated asset degradation or failure due to climate change (extreme precipitation events);
- Decreased asset capacity/performance due to climate change; and
- Inflation, tariffs.



City of Burlington

Asset Management Plan 2025

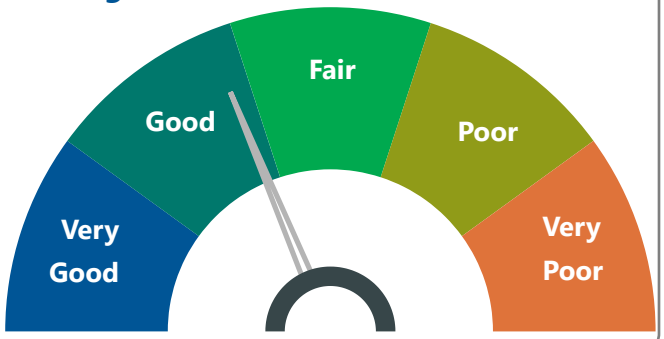
Appendix B-3 Recreation, Community and Culture

State of Recreation, Community and Culture Infrastructure

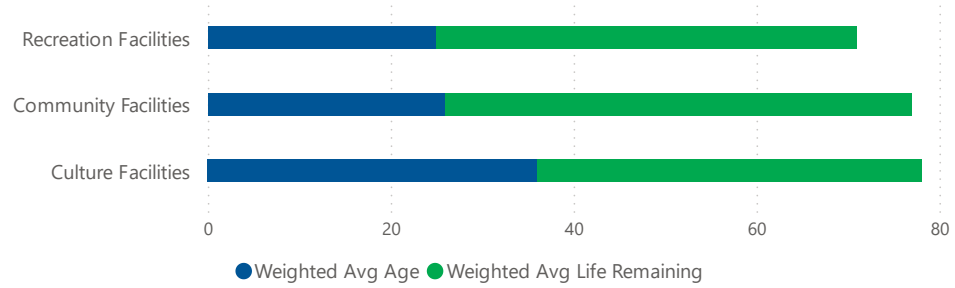
The City of Burlington is committed to infrastructure for recreation, community and culture.

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$1.15bn	Good	**Moderate**	Recreation Facilities	B	27 | 73 years
			Culture Facilities	B	
			Community Facilities	B	

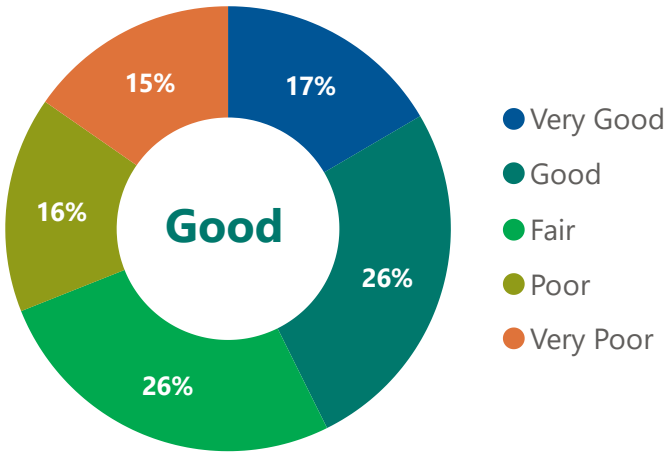
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

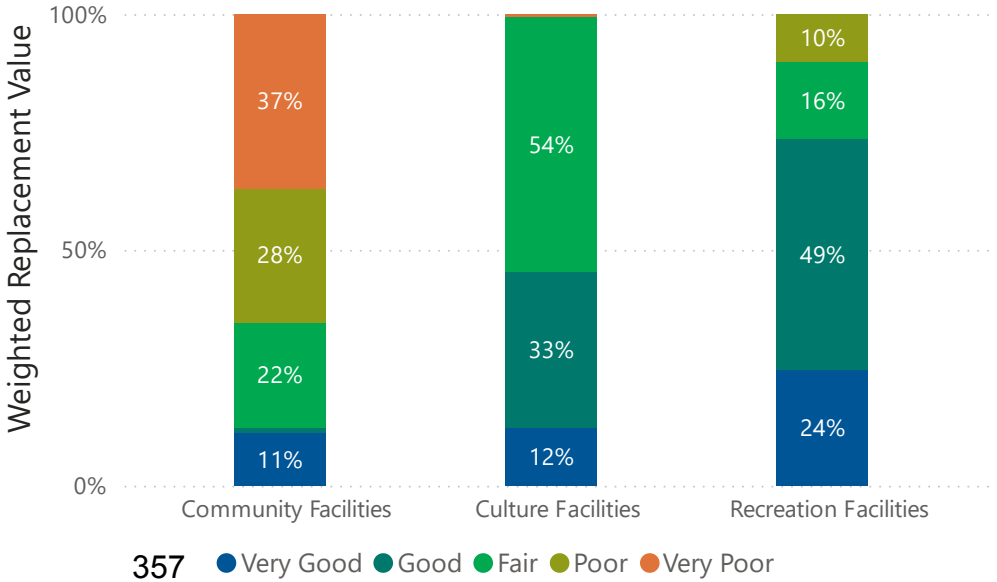


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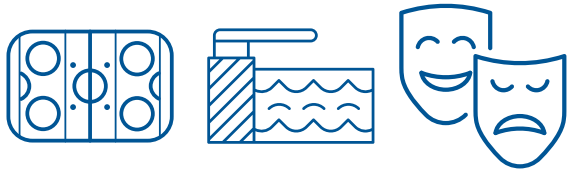
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Recreation, Community and Culture

Recreation, Community and Culture (RCC) assets play an integral role in the community, promoting a safe, healthy and fun lifestyle. Recreation, community and culture play a significant role in community building through the facilitation of active and passive activities, opportunities for structured and spontaneous play, strengthening of neighbourhood connections, local tourism, learning, public enjoyment and more. Recreation facilities and assets support indoor and outdoor activities such as those offered in arenas and pools, and the Tyandaga Golf Course.

Community facilities include a variety of different spaces that the community uses, such as our Community Centres, club- and externally-managed facilities such as the Appleby Tennis Club and Drury Lane Theatre, and specialty facilities such as event venues and Heritage buildings. Cultural facilities and assets include libraries, the Ireland House and Joseph Brant museums, the Burlington Centre for Performing Arts, the Burlington Art Gallery, and public art and monuments.

In 2024, the City completed the Live & Play Plan: A Parks and Recreation Facilities Master Plan, providing direction on the provision of City-operated recreation and cultural facilities. It outlines the overall vision, direction, and guidance for planning and making decisions with respect to delivering the City's Recreation, Community and Culture services. The plan is intended to guide future investment and respond to the changing landscape of Burlington. It was informed by public input and is aligned with local, provincial and national policies, strategies, best practices, trends, demographics, and growth forecasts.

1.0 State of Local Infrastructure

Having safe and accessible recreation services is a fundamental expectation of many members of the community. The City's Recreation, Community and Culture asset portfolio is comprised of Recreation Facilities, Community Facilities, and Culture Facilities. This section summarizes the portfolio of facilities associated with Recreation, Community, and Culture managed by the City.

As shown in **Table 1**, the City of Burlington's portfolio of facilities for Recreation, Community and Culture is valued at $1.15 billion, which is comprised of a mixture of Recreation Facilities valued at $448 million, Community Facilities valued at $475 million, and Culture Facilities valued at $227 million. This replacement value is derived from individual system-level assets/components within the facility management system and site amenities associated with each facility, such as pathways, bollards, and lighting.

The total replacement value for the Recreation, Community and Culture assets is $1,151.5 million, the average age is 27 years, the average service life is 73 years, and the average OSI condition is Good.



See **Table 1** for the asset inventory and valuation for each asset class as well as average age, average service and average OSI condition.

Table 1: Asset Inventory and Valuation – Recreation, Community and Culture

Asset Class	Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Community	Community Centres	9	$330.5 M	13	75	Fair
Community	Joint Venture	20	$68.9 M	47	75	Fair
Community	City View Park Pavilion	1	$4.9 M	2	75	Very Good
Community	Specialty Facilities	4	$10.6 M	40	82	Good
Community	Specialty Facilities - Heritage	5	$39.6 M	103	n/a	Fair
Community	Specialty Facilities - Revenue Generating	2	$20.8 M	18	75	Good
Culture	Arts Facilities	2	$112.8 M	25	75	Good
Culture	Libraries	4	$72.2 M	42	75	Good
Culture	Libraries - leased space	3	$13.5 M	27	75	Fair
Culture	Museums	3	$27.4 M	76	n/a	Very Good
Culture	Public Art	135	$2.1 M	18	n/a	Very Good
Recreation	Arenas	7	$348.0 M	21	75	Very Good
Recreation	Pools	7	$87.8 M	38	50	Good
Recreation	Specialty Facility - Golf	1	$12.6 M	36	71	Fair

These replacement values were developed using historic construction costs and a standardized costing index.

The Overall Service Index (OSI) Condition for Recreation, Community and Culture assets is determined by different factors, depending on the type of asset. For facilities, the OSI was partly derived from the industry standard performance benchmark rating, called the Facility Condition Index (FCI). An FCI does not represent a visually assessed condition of the facility but rather is the ratio between the like-for-like repair/renewal needs and the current replacement value of the asset. A limitation of FCI is that it does not describe the facility's performance or capacity to deliver the desired service, and its accuracy is dependent on the total current replacement value calculated. For this reason, the Overall Service Index (OSI) for facility reporting in this AMP uses both FCI and facility age as criteria, with age being used as a proxy for facility performance and/or capacity. For Public art, the condition was derived from previous inspection and/or assessment.

Assets such as Heritage buildings, museums and public art are considered to be unique and irreplaceable, and do not have a service life associated with them. They are not subject to planned replacement in the AMP.

2.0 Levels of Service

The City's inventory of RCC assets includes 41 Community Facilities, 12 Culture Facilities plus, 135 public art, and 15 Recreation Facilities.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2024) for Recreation, Community and Culture assets.

Table 2: Standardized Corporate LOS Metrics – Recreation, Community and Culture

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	0.79%
Technical LOS	SOGR Backlog	$12,248,000
Community LOS	% Poor or Very Poor	31.04%

The City has identified Community Levels of Service (LOS) and Technical Levels of Service, which are presented in **Table 3** and **Table 4**.

Table 3: Community Levels of Service – Recreation, Community and Culture

Service Attribute	Performance Metric	Current Performance (2024)
Availability	1 gym per number of residents	48,525
Availability	1 splash pad per number of children	2,200
Availability	1 outdoor pool per number of residents	64,700
Availability	1 indoor pool per number of residents	48
Availability	1 Arena/floor per number of residents	17,600

Table 4: Technical Levels of Service – Recreation, Community and Culture

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Average Facility Condition Index (FCI) for Recreational Facilities	0.08 (Fair)
Quality	Average Facility Condition Index (FCI) for Community Facilities	0.12 (Poor)
Quality	Average Facility Condition Index (FCI) for Cultural Facilities	0.06 (Fair)
Quality	Percentage of assets in Good or Very Good condition in Recreation Facilities	73.6%
Quality	Percentage of assets in Good or Very Good condition in Community Facilities	33.61%
Quality	Percentage of assets in Good or Very Good condition in Cultural Facilities	45.27%
Environmental Sustainability	Annual GHG emissions per square meter	43,494 g CO_2 /m^2

3.0 Asset Management Strategy

Table 5: Lifecycle Activities – Recreation, Community and Culture

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	Inspections through corporate contracts General facility maintenance and scheduled overhauls Critical equipment maintenance and overhauls Comprehensive condition assessment of equipment within contracts Contract initiation condition assessments Interim assessment to assess the quality of service	Deficiencies are not identified through inspections due to concealed components or difficult access. Increased lifecycle costs if maintenance is done improperly or not as scheduled. Incorrectly planned maintenance activities can lead to premature asset failure.
Renewal/Rehabilitation Activities Significant repairs designed to extend the life of the asset	Mid-life renewal of facilities and major overhauls and modernization of equipment to support department service	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled. Changes to asset use, as well as modernizing systems and adjusting to increasing levels of customer and employee service, are unknown and could lead to large expenditures.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/rehab is no longer an option.	Demolition and replacement Major renovation, including large additions and property acquisition	Large, complex design and construction projects may increase capital costs. Lead to inefficiencies and substandard services for both staff and customers.
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	Facility condition assessments Facility master plans Detailed condition assessments Community outreach/customer engagement Corporate Energy and Emissions Plan	Asset deterioration is over or underestimated. Inaccurate growth numbers and estimation of funding.
Expansion Activities Planned activities to improve an asset's capacity, quality and system reliability	Facility upgrades and service enhancements New facilities and buildings Building and/or property acquisition Leasing additional buildings and or properties Growth and expansions are guided by but not limited to Burlington's Strategic Plan 2015-2040, 2018-2022 Burlington's Plan: From Vision to Focus.	Growth activities are delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth. Master Plans may overestimate or underestimate required road expansions to accommodate for growth.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	Decommissioning Sale Change of ownership Consolidation of buildings Repurposing buildings	Improper disposal can lead to environmental impacts and expenses.

4.0 Risk

4.1 Internal Risk

As discussed in Section 5, Risk is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure X Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

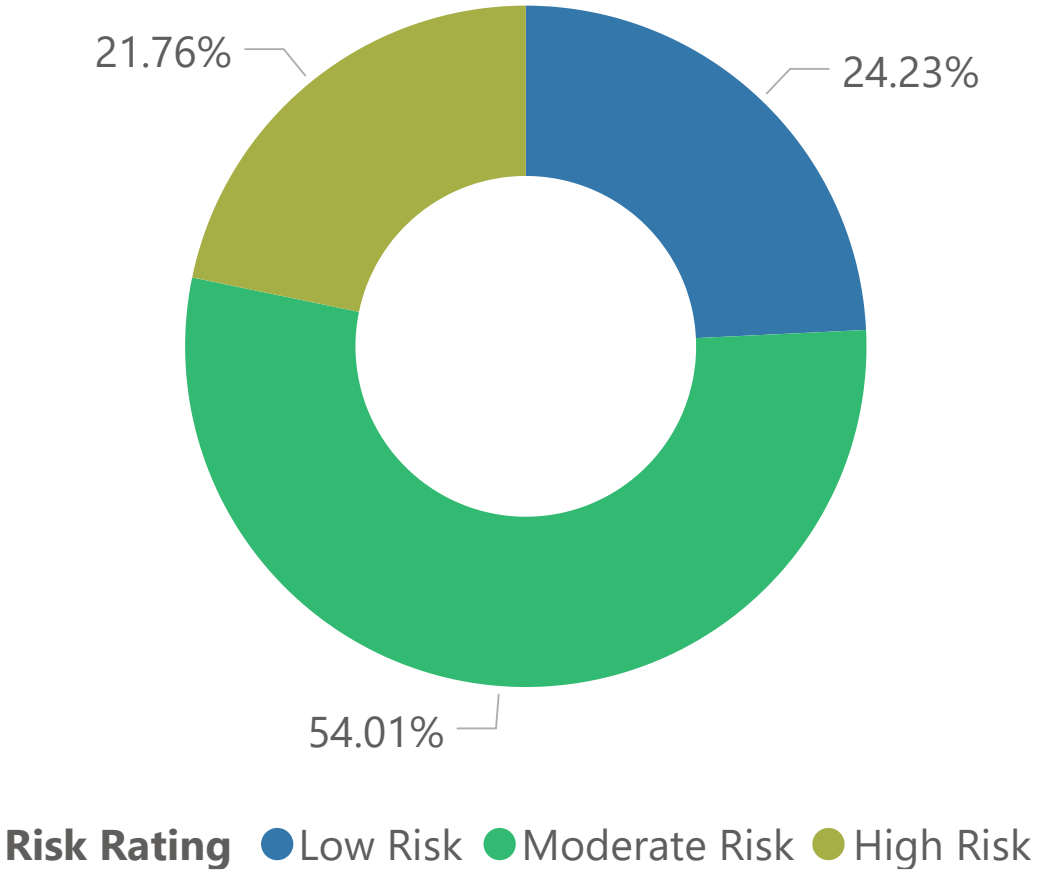
The triple bottom line **consequence of failure factors** are presented in **Table 6** for social, financial and environmental consequences.

Table 6: Consequence of Failure Factors – Recreation, Community and Culture

Social	Financial	Environmental
• Health and Safety • Asset Criticality	• Replacement Value • Revenue Generation	• Hazardous materials use/storage

The overall risk profile, shown in **Figure 1**, is Moderate for Recreation, Community and Culture assets, with 54% of assets assigned a Moderate risk rating, due to a combination of age and asset criticality.

Figure 1: Risk Rating by Replacement Value – Recreation, Community and Culture



4.2 External Risk

The following external risks have been identified for the Recreation, Community and Culture service area:

- Accelerated facility component degradation due to climate change (roofing, HVAC);
- Inflation, tariffs on material components needed for renewal or replacement; and
- Performance or capacity demands not met due to growth, shifts in demographics or community needs.



City of Burlington

Asset Management Plan 2025

Appendix B-4 Urban Forestry

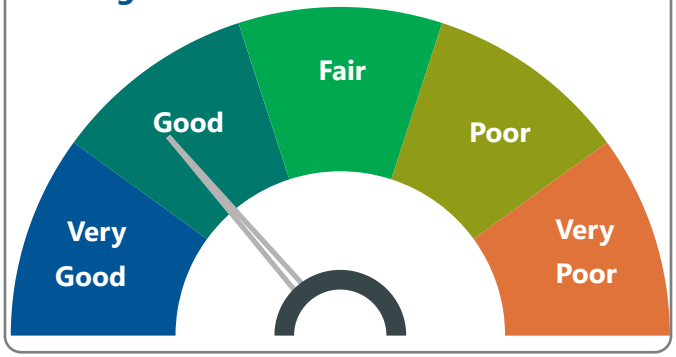
State of Urban Forestry Infrastructure

The City of Burlington recognizes that a strong, healthy urban forest provides many benefits to its residents.

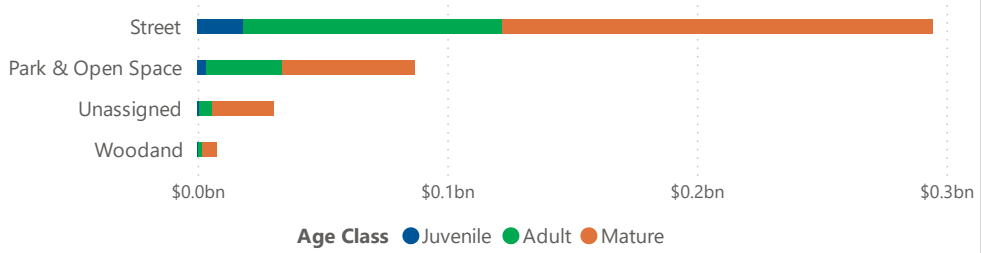
Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$430.6M	Good	n/a	Other	C-	3* | 50 years
			Parks and Open Space Trees	D-	
			Street Trees	B-	
			Woodlands	C-	

*Tree ages are not well documented, interpret with caution. Refer to Age Class alternatively

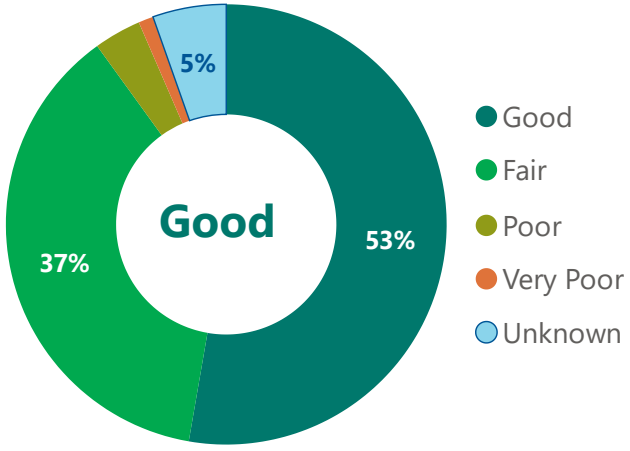
Average Condition



Tree Type by Age Class and Replacement Value



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

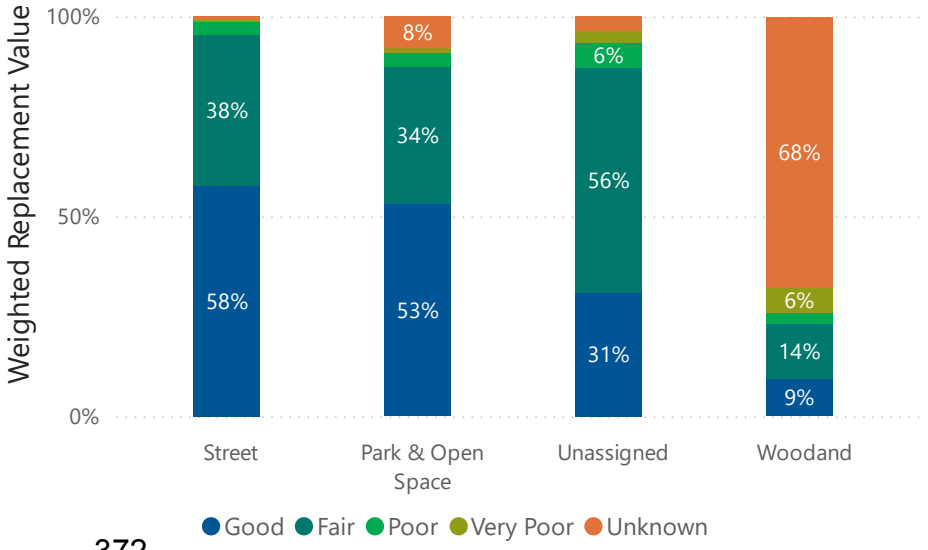


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Urban Forestry

The City of Burlington recognizes that a strong, healthy urban forest provides many benefits to its residents. The trees within Burlington's urban forest provide a wide range of environmental, economic, and social benefits, including improved air quality, reduced storm-water runoff, energy savings, noise reduction, natural bird and wildlife habitats, higher property values, and overall beautification of City streets and parks. This service contributes to the City's Strategic Plan, 3.2 Environmental and Energy Leadership.

The City's forestry section includes the forestry operations branch, whose team is responsible for routine tree maintenance and risk assessment; forest planning and health branch, tree planting and stumping, pest monitoring and management, public education and outreach and long-term management planning (e.g., Urban Forest Master Plan and Woodland Management Strategy); and the administration of both public and private tree bylaws.





1.0 State of Local Infrastructure

As a living asset, the City's urban forest presents unique challenges in the reporting of this critical asset. Traditional evaluation methodologies, lifecycle forecasting, and risk analysis must be adapted to accurately capture the full scope of services and needs of this asset. The information that the City collects about its municipally owned forest is constantly growing.

Municipal asset management has traditionally considered only the structural value, or replacement cost, of its urban forest. There is widely accepted acknowledgement of the benefits and values that an urban forest brings to its communities, and this valuation goes far beyond just the financial cost to replace the asset. The emerging inclusion of living or natural assets in municipal asset management and other endeavors, such as the Natural Asset Initiative, highlights the paradigm shift in urban forestry currently underway. Urban trees contribute tremendous, yet challenging to valuate, benefits to our community, including environmental, social, and economic net benefits. From oxygen generation, water recycling and erosion control to shade, crime reduction, mental health benefits and increased property values, our urban trees provide complex, if not immeasurable, benefits to our community. Recent studies have shown that a single tree may provide up to $162,000 in benefits over a 50-year time span.

Placing a monetary value on a natural asset is a complex task and is an evolving field in the urban forestry sector. In 2024, Burlington approved a 20-year Urban Forest Master Plan and Woodland Management Strategy, aiming to increase tree canopy cover to 35% by 2060. The plan and strategy focus on planting and maintaining trees, restoring woodlands, preparing for climate change and pests, and improving data tracking. and the economic value of urban forests.

1.1 Asset Inventory and Evaluation

The Urban Forestry inventory includes Street trees, Park and Open Space trees, Woodlands, and trees that have been inventoried but not yet assigned to a particular type. An update in inventory from the 2021 AMP was the addition of 37 woodlands identified in Forest Management Plans associated with the Urban Forest Master Plan and Woodland Management Strategy. These woodlands and their respective replacement values are included in this AMP, however age-class information, and therefore their condition, was not available. Another notable change in the inventory from the 2021 AMP was the omission of stumps in this AMP, which were included in the tree inventory in 2021.

Park and Open Space tree inventories continue to be largely undercounted and maybe four to five times larger than documented. It is for these reasons that the Data Confidence scores for Urban Forestry are lower than the other City asset service categories.

Condition for the Urban Forest inventory is inferred by the Age Class of the tree, as it represents where it is in its lifecycle from new to end-of-life. Due to data gaps in documented Tree Age information, Age Class is better known and classifies trees into three categories:

- Juvenile (0 – 10 years old)
- Adult (10 – 35 years old)
- Mature (35 years +)

The total replacement value for the Urban Forestry assets is $430.6 M, and the average OSI condition is Good.

Table 1 summarizes the Urban Forestry assets inventory, average OSI condition and the associated replacement values.

Table 1: Asset Inventory and Valuation – Urban Forestry

Asset Class	Quantity	Replacement Value ($2024)	Average OSI Condition
Park and Open Space Trees	12,874	$86.8 M	Good
Street Trees	49,276	$294.5 M	Good
Woodland Trees	832	$7.6 M	Good
Woodlands	37	$11.4M	Unknown
Unassigned	3,220	$30.2 M	Fair



2.0 Levels of Service

The City's inventory of Urban Forestry includes over 66,000 Trees and woodlots on property owned by the City.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2024) for the Urban Forestry service area.

Table 2: Standardized Corporate LOS Metrics – Urban Forestry

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	0.06%
Technical LOS	SOGR Backlog	$8,612,000
Community LOS	% Poor or Very Poor	4.57%

The City has identified Community Levels of Service and Technical Levels of Service, which are presented in **Table 3** and **Table 4.**

Table 3: Community Levels of Service – Urban Forestry

Service Attribute	Performance Metric	Current Performance (2024)
Availability	Current city-wide canopy cover	30%
Quantity	Total area of public woodlands (ha)	310.9
Quantity	Hectares of public woodland per 1000 people	1.6
Quantity	Number of street trees per 1000 people	340.9
Quantity	Total length of wooded trail network (km)	14

Table 4: Technical Levels of Service – Urban Forestry

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Percentage of Right-of-Way Trees in Poor or Dead Condition	5%
Quality	The ratio of Proactive Maintenance Costs versus Reactive Maintenance Costs for Right-of-Way Trees	$1,032,499.74
Quality	The average lifespan of Right-of-Way trees	50 years
Quality	The age-class distribution of City trees and the diversity (# families, # genera, # species) within each	0 to 10 years (31%): 71 genera, 86 species. 10 to 35 years (44%): 62 genera, 71 species > 35 years (25%): 58 genera, 73 species
Quality	Percentage of Right-of-Way trees that have survived the tree establishment phase (0-5 years)	87%
Quality	Renewal Ratio with a target of 2 Replacements to 1 Removal (2:1)	01:01.6

3.0 Asset Management Strategy

Table 5: Lifecycle Activities – Urban Forestry

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	Street and park inventories completed Park tree inspections (Level 1 Risk Assessment) completed Service calls for removals/clean-up considered (Level 2 Risk Assessment) Level 3 Risk Assessment: Tree Density Test (Resistograph) Grid Tree (Pruning) Program	Gaps in condition awareness and renewals not completed. Impacts to transportation or property damage. Risk of failure if poor condition not identified.
Renewal / Rehabilitation Significant repairs designed to extend the life of the asset	Emerald Ash Borer injection as a short-term treatment Gypsy Moth spraying	Accelerated rate of Emerald Ash Borer disease. Defoliation of trees by Gypsy Moth caterpillars.
Non-Infrastructure Actions or policies that can lower costs or extend service lives	Public education and outreach Specification for Tree Protection and Preservation, SS-12A, including the Aggregate Caliper Method for tree replacement guidelines Integrated Pest Management guidelines City Tree Bylaw Public Tree Bylaw Urban Forest Master Plan and Woodland Management Strategy	Loss of urban forest canopy due to neglect, damage, or unnecessary removals. Insufficient tree protection and replacement value to the City in the event of removal. Loss of urban forest due to pests or disease. Unauthorized removal of municipal assets. Long-term impact to the urban forest.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
		Unauthorized removal of private assets. Long-term impact to the urban forest. No strategic framework in place to guide the direction.
Expansion Activities Planned activities to improve an asset's capacity, quality, and system reliability	New plantings in new developments	No benefits of the urban forest to the community.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	Tree Removal Emerald Ash Borer Strategy	Risk of collapse, damage, or injury.

4.0 Risk

4.1 Internal Risk

Unlike the other asset service categories in this AMP, determining the risk at the asset level for Urban Forestry is much more complex and challenging. While the Likelihood of Failure could be estimated by age, City staff recognize that the risk a particular tree presents is highly situational: location, age, microclimatic variations and species, amongst multiple other factors. For these reasons, a risk score was not developed for this iteration of the AMP.

4.2 External Risk

The following external risks have been identified for the Urban Forestry service area:

- Climate change impacts such as pest and disease proliferation; extreme weather events, including wind and ice storms, heat waves and drought; and
- Encroachment and damage from private development, construction, or other infrastructure, such as sidewalk lifting.



City of Burlington

Asset Management Plan 2025

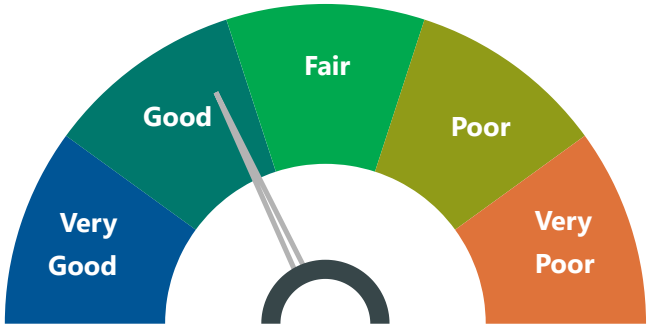
Appendix B-5 Parks

State of Parks Infrastructure

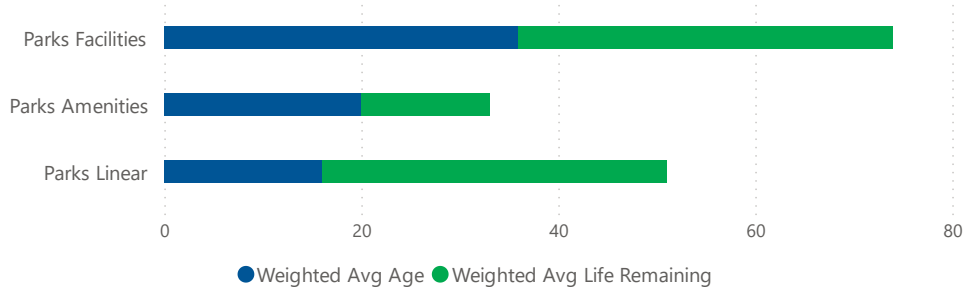
Burlington's Parks infrastructure plays an important role in contributing to a "Healthy and Greener City"

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$403.81M	Good	**Moderate**	Parks Amenities	C	21 | 48 years
			Parks Facilities	B	
			Parks Linear	D	

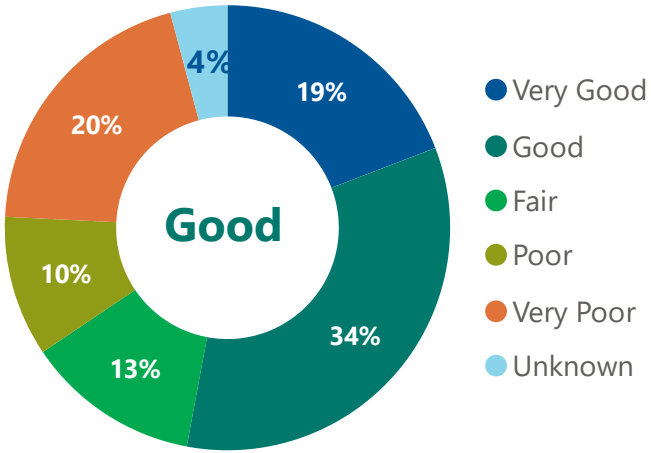
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

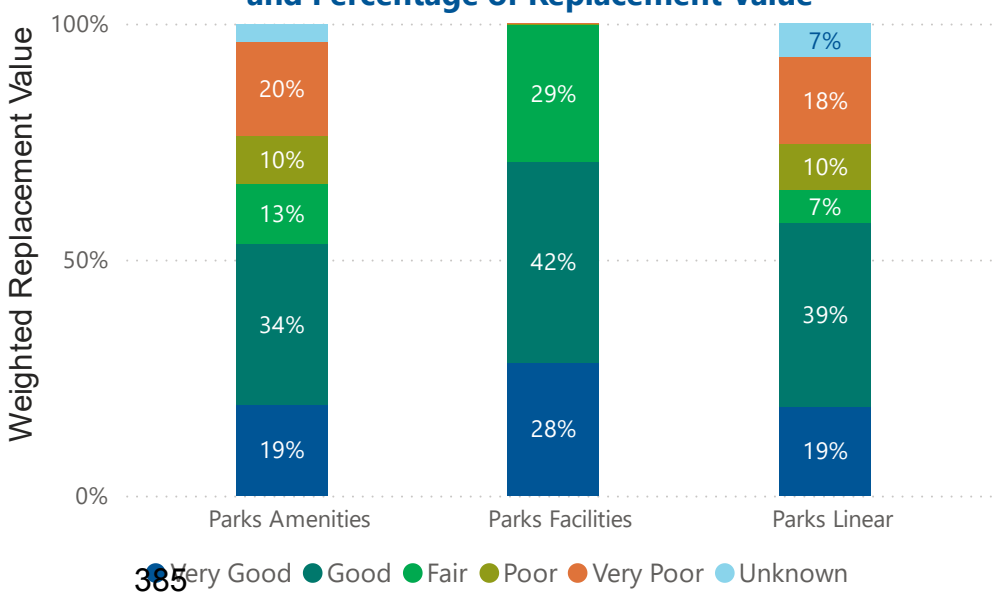


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Parks

Burlington's Parks infrastructure spans nearly 700 hectares and plays an important role in contributing to a "Healthy and Greener City," a key strategic direction established in the City's Strategic Plan.

In 2024 the City completed The Live & Play Plan: A Parks and Recreation Facilities Master Plan providing direction on the provision of City-operated parks. It outlines the overall vision, direction, and guidance for planning and making decisions with respect to delivering the City's Recreation, Community, and Culture services. The plan is intended to guide future investment and respond to the changing landscape of Burlington. It was informed by public input and is aligned with local, provincial and national policies, strategies, best practices, trends, demographics, and growth forecasts.

In 2023, the City released its Parks Provisioning Master Plan to form park dedication guidelines, identify service level targets, and update its park classification system. Across these six park classification types - Community Parks, Destination Parks, Ecological Parks, Linear Parks and Greenways, Neighbourhood Parks, and Urban Parks – the City owns and maintains a wide variety of infrastructure.

In this AMP, Parks infrastructure is classified into three asset categories: Parks Amenities, Parks Linear (Assets) and Parks Facilities. The infrastructure includes, but is not limited to, a network of trails and pathways, gardens and natural areas, a variety of sports fields and playground equipment, public concessions, and washrooms.

The City's investment in these assets helps to support families, build community capacity, improve health and physical activity levels and enhance the overall quality of life of Burlington's citizens.

1.0 State of Local Infrastructure

The City's Parks service area is responsible for the maintenance and operation of a network of parks, facilities, and paths. This section summarizes the Parks assets managed by the City.

The City's portfolio of infrastructure assets for Parks services comprises Parks Amenities assets, valued at $142.1 million **Table 1,** Parks Facilities valued at $68.6 million **Table 2**, and Parks Linear assets valued at $193.2 million **Table 3**.

The total replacement value for Parks assets is $403.8 million, the average age is 21 years, the average service life is 48 years, and the average OSI condition is Good.

These replacement values were derived from historic construction costs and, for facilities, from individual system-level asset/component costs within the facility management system.

Table 1: Asset Inventory and Valuation – Parks Amenities

Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Community Garden	9	$0.7 M	8	93	Very Good
Leash Free Areas	9	$0.7 M	8	20	Fair
Multi-Use Courts	69	$2.0 M	17	21	Poor
Park Signs and Gateways	1154	$5.2 M	15	20	Good
Playgrounds and Fitness Equipment	478	$19.3 M	10	16	Fair
Shade Structures	40	$5.4 M	20	36	Fair
Site Furniture	5330	$23.8 M	14	19	Good
Site Provisions	215	$2.1 M	17	56	Good
Skateparks	12	$2.9 M	15	32	Good
Splash Pads	18	$3.9 M	10	29	Good

Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Sport fields	111	$50.5 M	20	24	Fair
Tennis, Pickleball	25	$2.9 M	19	23	Fair
Unique Assets	32	$22.5 M	42	66	Fair

Table 2: Asset Inventory and Valuation – Parks Facilities

Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Boardwalk	1	$3.8 M	24	50	Good
Maintenance Buildings	13	$29.0 M	43	75	Good
Washroom Buildings	15	$35.7 M	31	75	Very Good

Table 3: Asset Inventory and Valuation – Parks Linear

Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Fencing	33.5 km	$12.3 M	27	28	Poor
Multi-Use Trails	201km	$50.2 M	13	32	Fair
Pedestrian Bridges and Piers	69	$77.7 M	18	65	Good
Railings, Retaining Walls and Stairs	388	$5.7 M	21	66	Fair
Servicing	44 km	$11.2 M	8	49	Very Good
Shoreline Protection	3.2 km	$18.3 M	7	99	Very Good
Sports field Fencing and Netting	12.7 km	$17.8 M	15	27	Fair

For Parks Amenities and Parks Linear assets, the Overall Service Index (OSI) condition was derived based on the age of the asset as a proportion of its Estimated Service Life. For Park Facilities, the OSI was partly derived from the industry standard performance benchmark rating, called the Facility Condition Index (FCI). An FCI does not represent a visually assessed condition of the facility but rather is the ratio between the like-for-like repair/renewal needs and the current replacement value of the asset. A limitation of FCI is that it does not describe the facility's performance or capacity to deliver the desired service, and its accuracy is dependent on the total current replacement value calculated. For this reason, the Overall Service Index (OSI) for facility reporting in this AMP uses both FCI and facility age as criteria, with age being used as a proxy for facility performance and/or capacity.

2.0 Levels of Service

The City's inventory of Parks assets includes 11,237 individual assets across Parks Linear, Parks Amenities and Parks Facilities.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 4** for the current LOS (2024) for Parks.

Table 4: Standardized Corporate LOS Metrics – Parks

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	2.28%
Technical LOS	SOGR Backlog	$56,490,000
Community LOS	% Poor or Very Poor	30.3%

The City has identified Community Levels of Service (LOS) and Technical Levels of Service, which are presented in **Table 5** and **Table 6.**

Table 5: Community Levels of Service – Parks

Service Attribute	Performance Metric	Current Performance (2024)
Availability	Number of hectares of parkland per 1,000 persons	3.73 ha
Availability	Number of diamonds per population	1:1,280
Availability	Number of rectangular fields per population	1:1,527
Availability	Percentage of people within 400 m walking distance of a park	58%
Availability	Percentage of people within 500 m walking distance of a playground	54%
Availability	Total length of the trail network	157 km

Table 6: Technical Levels of Service – Parks

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Facility Condition Index (FCI)	0.03 (Good)
Quality	Number of planned and reactive maintenance hours per 1,000 square meters	TBD
Quality	Percentage of assets in Good or Very Good condition	52.9%
Availability	Number of hectares of parkland per 1,000 persons	3.73 ha
Availability	Number of diamonds per population	1:1,280
Availability	Number of rectangular fields per population	1:1,527
Availability	Percentage of people within 400 m walking distance of a park	58%
Availability	Percentage of people within 500 m walking distance of a playground	54%
Availability	Total length of the trail network	157 km
Environmental Sustainability	Annual GHG emissions per square meter	8,687 g CO_2 /m^2

3.0 Asset Management Strategy

Table 7: Lifecycle Activities – Parks Amenities

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	Park Amenities assets are monitored and repaired based on reporting deficiencies. Playgrounds are inspected every month. Splash Pads are inspected every day during the operation.	Regular planned maintenance, in combination with unplanned reactive maintenance, is attributed to a number of reasons. A backlog in maintenance can lead to the failure of an asset in advance of planning capital replacement.
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	Tennis courts are resurfaced halfway through their lifecycle; artificial turf carpets are replaced 4 times throughout the field's lifecycle, and skateparks are renewed on a 10-year cycle	Without planned renewal or rehabilitation activities, the risks of failure are increased, and park amenities will be closed until full replacement occurs. Changes to asset use, as well as modernizing systems and adjusting to increasing levels of customer and employee service.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option	The approach to replacement is to bundle as many assets as possible that require replacement into one construction contract by park for cost efficiencies and to reduce disruption to the public.	Missing the window of opportunity to replace infrastructure at end-of-life results in assets being closed for public use.
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	Infrastructure conformance with applicable law, technical standards, Ontario Building Code, government policies and Master Plans	Asset deterioration is over or underestimated, inaccurate growth forecasts or estimation of funding.
Expansion / Service Enhancements Planned activities to improve an asset's capacity, quality and system reliability	New infrastructure is either identified as part of the City's Development Charge Study, through public outreach by the Recreation Community Culture Service or by Council-approved master plans such as the Community Trails Strategy	New parks are the only eligible assets that can be funded by Development Charges and require contribution by the Park Dedication Reserve Fund.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	Disposal activities range significantly, given the diverse range of asset types in the Park Amenities category. Where possible, materials are recycled or repurposed	City has a responsibility to adhere to provincial regulations related to disposal activities.

Table 8: Lifecycle Activities – Parks Facilities

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	Inspections through corporate contracts General facility maintenance Critical equipment maintenance and overhauls Comprehensive condition assessment of equipment within contracts Contract initiation condition assessments Interim assessment to assess the quality of service	Deficiencies are not identified through patrols. Increased lifecycle costs if maintenance is done improperly or not as scheduled. May contribute to premature asset failure, service disruptions, or pose health and safety risks. Customer dissatisfaction with quality, safety or accessibility of facilities.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	Mid-life renewal of facilities and major overhauls and modernization of equipment to support department service	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled. Changes to asset use, as well as modernizing systems and adjusting to increasing levels of customer and employee service.
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option.	Demolition and Replacement	Delays in construction projects may result in health and safety risks, higher costs, longer service disruption and customer dissatisfaction.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	Facility Master Plans Community Outreach / Customer Engagement Corporate Energy and Emissions Plan	Asset deterioration is over or underestimated. Inaccurate growth numbers and estimation of funding.
Expansion / Service Enhancements Planned activities to improve an asset's capacity, quality and system reliability	Facility Upgrades and Service Enhancements New Facilities and Buildings Change of Ownership	Growth activities are delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	Decommissioning Sale Change of Ownership Consolidation of Buildings Repurposing Buildings	Improper disposal can lead to environmental impacts and expenses.

Table 9: Lifecycle Activities – Parks Linear Assets

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	Pathways and Multi-Use Recreational Trails are monitored and repaired based on reported deficiencies. Pedestrian bridges are assessed every 2 years by external experts and monitored by staff.	A backlog in maintenance can lead to the failure of an asset in advance of planning capital replacement.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	The Waterfront Promenade and seawall are repaired annually. Decks and railings are replaced on pedestrian bridges halfway through their lifecycle Resurfacing Deck & Railing Replacement Minor Rehabilitation (deck, caisson and railing removal, refacing, railing replacement, pavement, seawall and cap removal) For poured-in-place skateparks – crack sealing, railing replacement and slab replacement. For modular skateparks, concrete pads will last 30 years, but modular skateboarding elements to be replaced at year 15	Without planned renewal or rehabilitation activities, the risks of failure are increased, and the consequences are significant. Changes to asset use, as well as modernizing systems and adjusting to increasing levels of customer and employee service.
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and	Bundle as many assets that require replacement into one construction contract by park for cost efficiencies and to reduce disruption to the public	Missing the window of opportunity to replace infrastructure at end-of-life results in assets being closed for public use.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
renewal/ rehab is no longer an option		
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	Infrastructure conformance with applicable law, technical standards, Ontario Building Code, government policies and Master Plans	Asset deterioration is over or underestimated, inaccurate growth forecasts or estimation of funding.
Expansion / Service Enhancements Planned activities to improve an asset's capacity, quality and system reliability	New infrastructure is either identified as part of the City's Development Charge Study, through public outreach by the Recreation Community Culture Service or by Council-approved master plans such as the Community Trails Strategy	Trails and new parks are the only eligible assets that can be funded by Development Charges and require contribution by the Park Dedication Reserve Fund.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	Disposal activities range significantly, given the diverse range of asset types in the Park Linear category. Where possible, materials are recycled or repurposed, e.g. recycled granular is specified for the construction of Multi-Use Recreational Trails	City has a responsibility to adhere to provincial regulations related to disposal activities.

4.0 Risk

4.1 Internal Risk

As discussed in Section 5, Risk is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure X Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

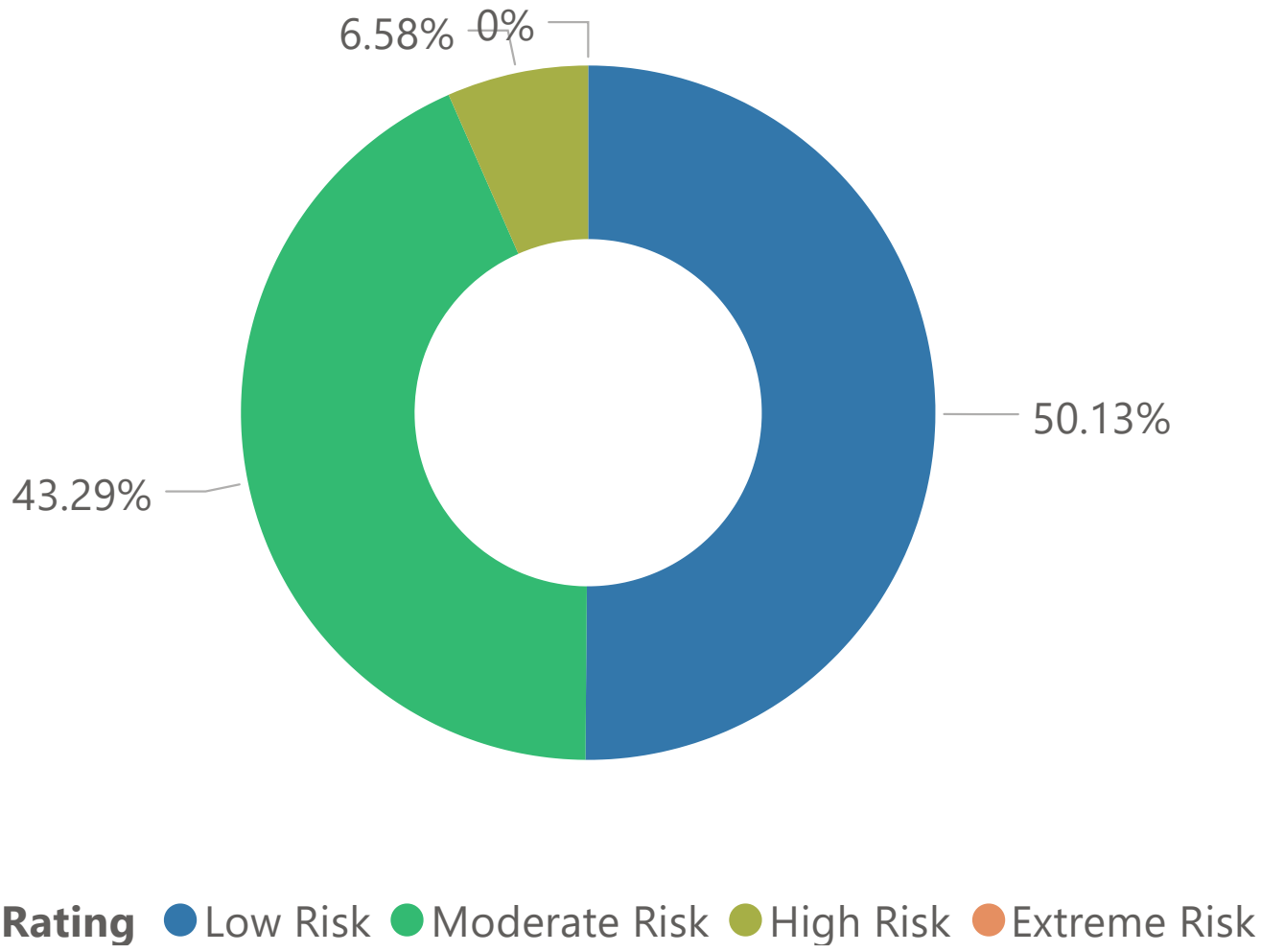
The triple bottom line **consequence of failure factors** are presented in **Table 10** for social, financial and environmental consequences.

Table 10: Consequence of Failure Factors – Parks

Social	Financial	Environmental
• Park designation • Population Density	• Replacement Value	• N/A

The overall risk profile, shown in **Figure 1,** is Moderate for Parks, with 43.29% of assets assigned a Moderate risk rating.

Figure 1: Risk Rating by Replacement Value – Parks



4.2 External Risk

The following external risks have been identified for the Parks service area:

- Accelerated asset degradation or need for additional Maintenance due to prolonged seasonal use due to climate change impacts;
- Inflation, tariffs on material components needed for renewal or replacement; and
- Performance or capacity demands not met due to growth, shifts in demographics or community needs.



City of Burlington

Asset Management Plan 2025

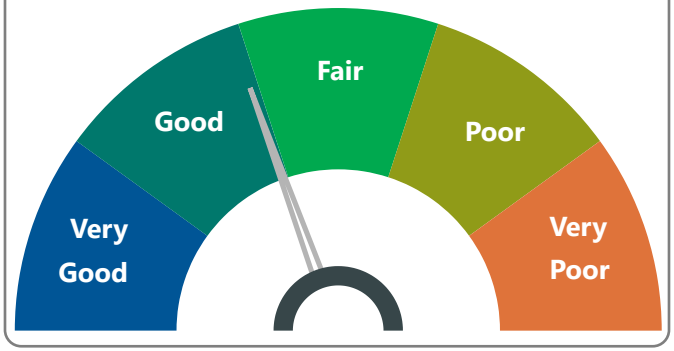
Appendix B-6 Corporate Facilities

State of Corporate Facilities Infrastructure

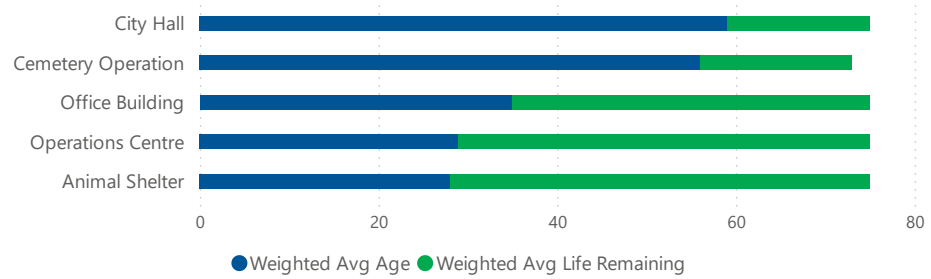
Corporate Facilities includes administrative buildings that enable use by several different service areas.

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$252.08M	Good	**Moderate**	Administration Buildings	B	40 | 75 years

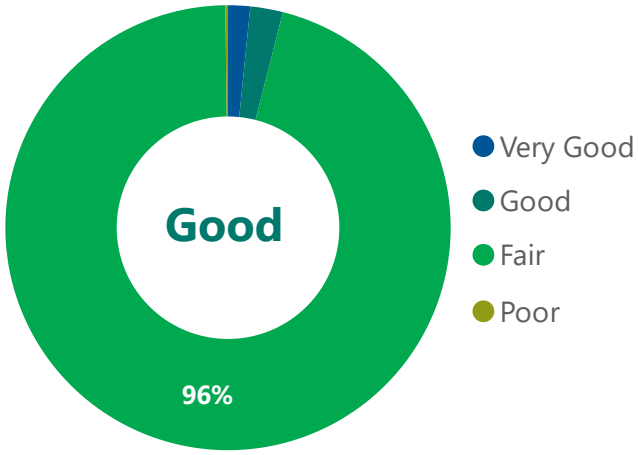
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

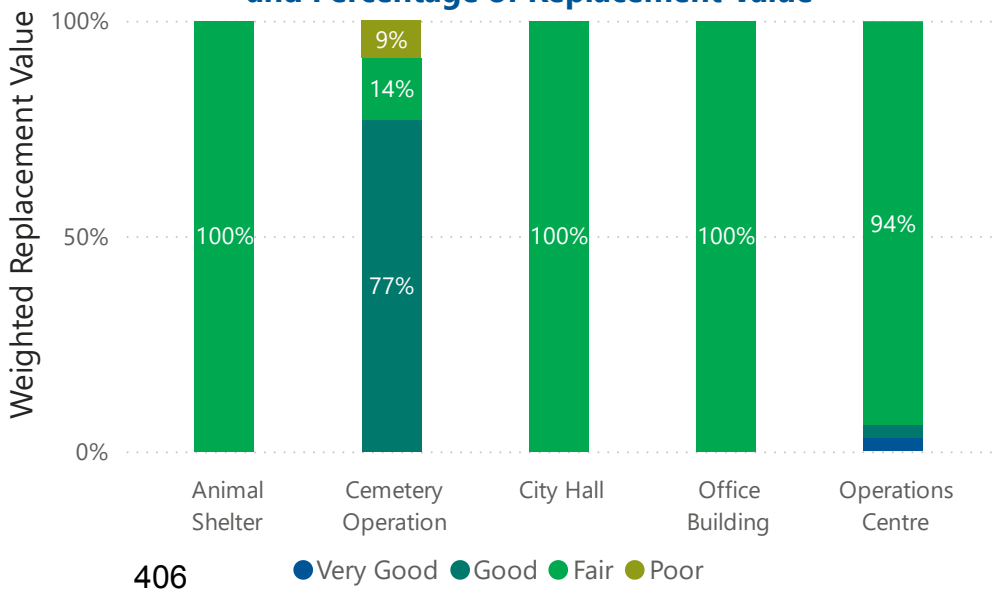


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Corporate Facilities

The City owns and operates facilities that are used to provide a wide range of services. Having safe and reliable facilities is a fundamental expectation for all users. The assets included within Corporate Facilities include locations such as administrative buildings and operations centre that enable use by several different service areas. These assets support service delivery by providing work and meeting space that is both safe and efficient for use by City staff, Council, Boards and Commissions and members of the community.

1.0 State of the Local Infrastructure

The City's corporate facility asset portfolio consists of facilities that primarily provide an administrative or supportive function to other departments or services. This includes City Hall, Sim Square, the Harvester Road Operations Centre campus (comprised of multiple buildings on site), and the Animal Shelter and Cemetery Operation buildings at Greenwood Cemetery. This section summarizes the portfolio of assets associated with the various corporate facilities managed by the City.

The City of Burlington's portfolio of infrastructure assets for corporate facilities is valued at $252 million. This replacement value is sourced from individual system-level assets/components within the facility management system.

The total replacement value for the Corporate Facilities infrastructure is $252.1 million, the average age is 40 years, the average service life is 75 years, and the average OSI condition is Good.

See **Table 1** for the asset inventory and valuation for each asset type, as well as average age, average service life and average OSI condition for the Administrative Buildings.

Table 1: Asset Inventory and Valuation – Corporate Facilities

Asset Class	Asset Type	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Administration Buildings	Animal Shelter	$6.9 M	28	75	Fair
Administration Buildings	Cemetery Operation	$3.2 M	56	71	Good
Administration Buildings	City Hall	$84.6 M	59	75	Fair
Administration Buildings	Office Building	$32.5 M	35	75	Fair
Administration Buildings	Operations Centre	$124.9 M	29	74	Good

Corporate facilities are maintained through corporate contracts, and condition assessments are carried out by qualified assessors. Comprehensive condition assessments are typically performed on a 5-year basis, and additional interim assessments are completed following new acquisitions, major contracted construction work, or as required.

Condition can be reported at the asset level, as well as at the Facility level, using an industry-standard performance benchmark rating called the Facility Condition Index (FCI). An FCI does not represent a visually assessed condition of the facility but rather is the ratio between the like-for-like repair/renewal needs and the current replacement value of the asset. A limitation of FCI is that it does not describe the facility's performance or capacity to deliver the desired service, and its accuracy is dependent on the total current replacement value calculated. For this reason, the Overall Service Index (OSI) for facility reporting in this AMP uses both FCI and facility age as criteria, with age being used as a proxy for facility performance and/or capacity.

2.0 Levels of Service

The City's inventory of Corporate Facilities assets ranges in average age from 28 years for the animal shelter to 59 years for City Hall.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2024) for Corporate Facilities.

Table 2: Standardized Corporate LOS Metrics – Corporate Facilities

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	1.17%
Technical LOS	SOGR Backlog	$1,881,000
Community LOS	% Poor or Very Poor	19%

The City has identified Community and Technical Levels of Service, which are presented in **Table 3**.

Table 3: Community and Technical Levels of Service – Corporate Facilities

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Facility Condition Index (FCI)	0.14 (Poor)
Environmental Sustainability	Annual GHG emissions per square meter	11,323 g CO_2 /m^2

3.0 Asset Management Strategy

Table 4: Lifecycle Activities – Corporate Facilities

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	Inspections through corporate contracts General facility maintenance Critical equipment maintenance and scheduled overhauls Comprehensive condition assessment of equipment within contracts Contract initiation condition assessments Interim assessment to assess the quality of service	Deficiencies are not identified through inspections due to concealed components or difficult access. Increased lifecycle costs if maintenance is done improperly or not as scheduled. Incorrectly planned maintenance activities can lead to premature asset failure.
Renewal/Rehabilitation Activities Significant repairs designed to extend the life of the asset	Mid-life renewal of facilities and major overhauls and modernization of equipment to support department service	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
		Changes to asset use, as well as modernizing systems and adjusting to increasing levels of customer and employee service, are unknown and could lead to large expenditures.
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/rehab is no longer an option	**Demolition and Replacement** Major renovation, including large additions and property acquisition	Large, complex design and construction projects may increase capital costs. Leads to inefficiencies and substandard services for both customers and staff.
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	**Facility Master Plans** Community Outreach / Customer Engagement Corporate Energy and Emissions Plan	Asset deterioration is over or underestimated. Inaccurate growth numbers and estimation of funding.
Expansion Activities Planned activities to improve an asset's capacity, quality and system reliability	Facility Upgrades and Service Enhancements New Facilities and Buildings Building and/or property acquisition	Growth activities are delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Leasing additional buildings and/or properties Growth and expansions are guided by but not limited to Burlington's Strategic Plan 2015-2020 and the 2018-2022 Burlington's Plan: From Vision to Focus	Master Plans may overestimate or underestimate required road expansions to accommodate for growth.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	**Decommissioning** Sale Change of Ownership Consolidation of Buildings Repurposing Buildings	Improper disposal can lead to environmental impacts and expenses.

4.0 Risk

4.1 Internal Risk

As discussed in Section 5, risk is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure X Consequence of Failure

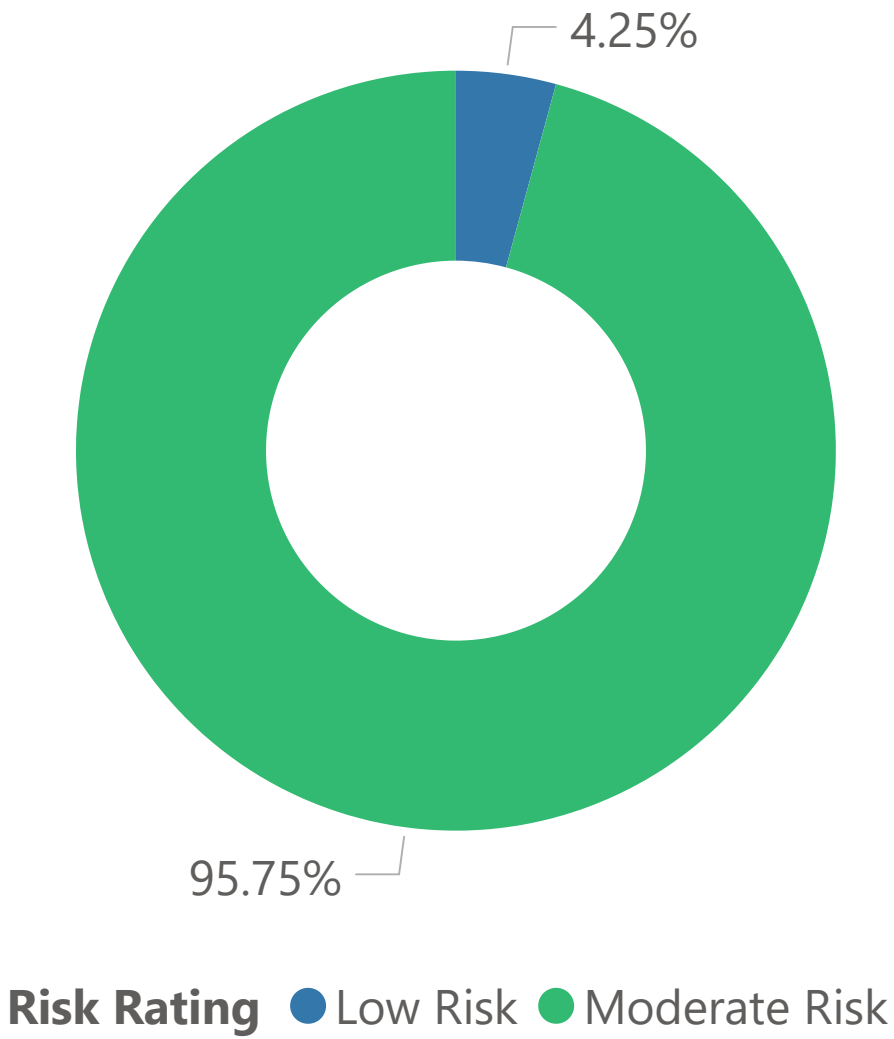
The **likelihood of failure factor** is derived from the condition/age of the asset.

The triple bottom line **consequence of failure factors** are presented in **Table 5** for social, financial and environmental consequences.

Table 5: Consequence of Failure Factors – Corporate Facilities

Social	Financial	Environmental
• Facility Criticality	• Replacement Value • Revenue Generation	N/A

Figure 1: Risk Rating by Replacement Value – Corporate Facilities



4.2 External Risk

The following external risks have been identified for the Corporate Facilities service area:

- Accelerated facility component degradation due to climate change (roofing, HVAC);
- Inflation, tariffs on material components needed for renewal or replacement; and
- Performance or capacity demands not met due to growth, shifts in demographics or community needs.



City of Burlington

Asset Management Plan 2025

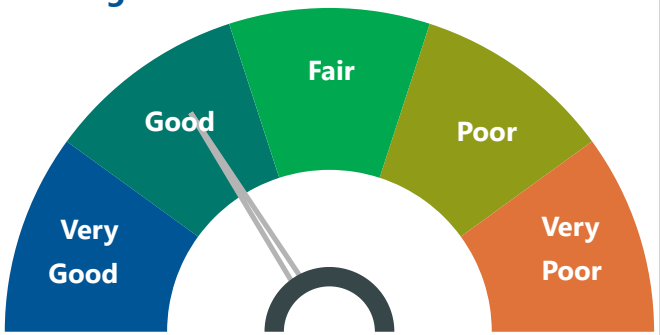
Appendix B-7 Transit

State of Transit Infrastructure

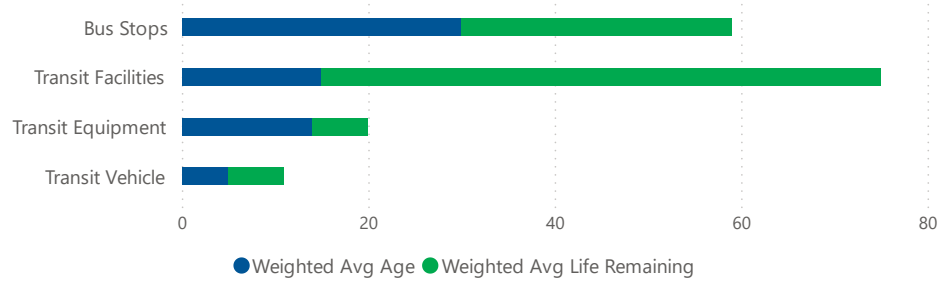
The City of Burlington is committed to infrastructure for Transit.

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$246.15M	Good	**Moderate**	Bus Stops	B	12 | 46 years
			Transit Equipment	B	
			Transit Facilities	B	
			Transit Vehicles	A	

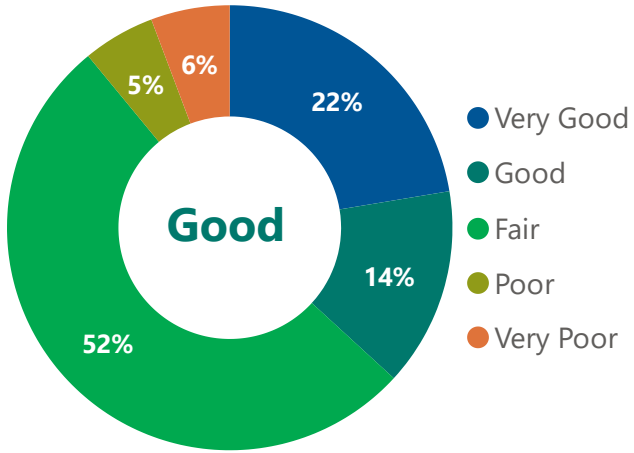
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

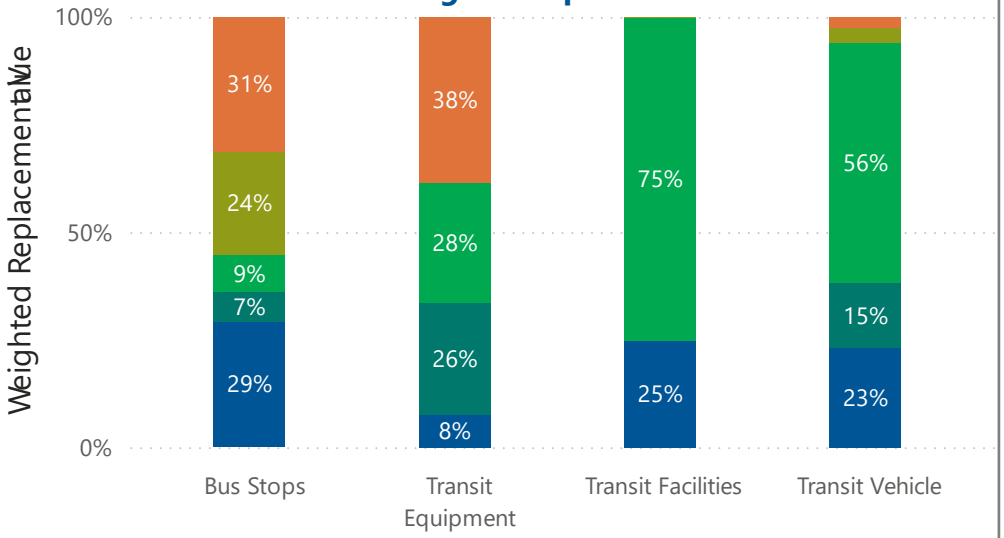


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Transit

The City of Burlington provides residents and visitors with a wide range of opportunities for getting around, including walking, cycling, public transit, and automobiles. Transit plays an integral role in the delivery of city services as it supports integrated mobility, environmental sustainability, and affordability. The City has developed an Integrated Mobility Plan (IMP), which presents a strategy for transportation in Burlington to the year 2051. The IMP has the following overarching goals:

- A wider range of transportation options, regardless of age, means or ability;
- The efficient transportation of more people with compact modes of transportation (such as buses, bicycles, and walking);
- A transportation system that is well-connected to other Regions;
- Fast, reliable and frequent transit; and
- The improvement of facilities for cyclists and pedestrians.

Currently, Burlington Transit operates 9 full-service routes, 4 peak time routes and 3 late-night service routes, with regular connections to GO Transit, Oakville Transit and Hamilton Street Railway.

The 2020 – 2024 Burlington Transit Business Plan guides the implementation of the City's transit service improvements, with a key focus on identifying the strategies and necessary resources required to meet transit ridership growth targets as identified in Halton Region's 2011 Transportation Master Plan. The City's Transit assets are divided into bus stops, facilities, vehicles, and equipment.

1.0 State of Local Infrastructure

Providing a high-quality, safe, efficient, accessible, convenient, and reliable transit service that meets the expectations of the community is an important goal for the City of Burlington. This section summarizes the portfolio of infrastructure assets associated with the Transit services managed by the City.

The total replacement value for the Transit assets is **$246.1 million, the average age is 12 years, the average service life is 46 years, and the average OSI condition is Fair.** See **Table 1** for the asset inventory and valuation for each asset class as well as average age, average service life and average OSI condition.

Table 1: Asset Inventory and Valuation – Transit

Asset Class	Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Bus Stops	Concrete Pads	823	$12.9 M	36	66	Good
Bus Stops	Shelters	277	$3.7 M	9	36	Fair
Transit Equipment	Various	various	$6.1 M	14	17	Fair
Transit Facilities	Bus Terminal	8	$4.3 M	37	75	Fair
Transit Facilities	Transit Operations	26	$115.8 M	14	75	Fair
Transit Vehicle	Conventional Bus	74	$96.2 M	5	12	Good
Transit Vehicle	Specialized Bus	16	$6.4 M	5	7	Fair
Transit Vehicle	Support Vehicles	11	$0.7 M	8	12	Poor

1.0 State of Local Infrastructure

The City of Burlington's portfolio of infrastructure assets for Transit services is comprised of a mixture of Bus Stops, valued at $16.6 million, Facilities valued at $120.1 million and Vehicles & Equipment valued at $109.4 million. These replacement values were developed based on a review of purchase costs, current market costs, and regulated codes/requirements.

For Transit facilities, the OSI was partly derived from the industry standard performance benchmark rating, called the Facility Condition Index (FCI). An FCI does not represent a visually assessed condition of the facility but rather is the ratio between the like-for-like repair/renewal needs and the current replacement value of the asset. A limitation of FCI is that it does not describe the facility's performance or capacity to deliver the desired service, and its accuracy is dependent on the total current replacement value calculated. For this reason, the Overall Service Index (OSI) for facility reporting in this AMP uses both FCI and facility age as criteria, with age being used as a proxy for facility performance and/or capacity.

For the remaining Transit assets, the OSI was based on the age and expected service life of the asset.

Note: at the time of publication, the Bus Terminal has been included under the City's asset portfolio, but effective March 31, 2025, was removed from service. Decisions on decommissioning or offloading of this asset had not been made at the time of publication.

2.0 Levels of Service

The City's inventory of Transit assets includes 8 bus terminals and 26 transit operations facilities, as well as 74 conventional buses, 16 specialized buses and 11 support vehicles.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2024) for Transit assets.

Table 2: Standardized Corporate LOS Metrics – Transit

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	4.90%
Technical LOS	SOGR Backlog	$7,350,000
Community LOS	% Poor or Very Poor	10.97%

The City has identified Community Levels of Service (LOS) and Technical Levels of Service, which are presented in **Table 3** and **Table 4**.

Table 3: Community Levels of Service – Transit

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Percentage of vehicles in Good or Very Good condition	38.16%
Quality	Percentage of bus stops and equipment in Good or Very Good condition	36.04%
Reliability	Percentage of urban-area residents within 400 meters of a bus stop	75.40%
Reliability	Number of events that are non-compliant with AODA (Transportation Standard)	100

Table 4: Technical Levels of Service – Transit

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Average Facility Condition Index (FCI)	0.16 (Poor)
Quality	Percentage of maintenance completed on schedule for fleet assets	100%
Safety	Number of collisions reported by drivers per kilometer driven	208,484.96
Environmental Sustainability	Annual GHG emissions per square meter of facility	26,295 g CO_2/m^2
Environmental Sustainability	Percentage of fleet transitioned to non-fossil fuel	0%

3.0 Asset Management Strategy

Table 5: Lifecycle Activities – Transit

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	**Transit Facilities:** Inspections through corporate contracts General facility maintenance Critical equipment maintenance and scheduled overhauls Comprehensive condition assessment of equipment within contracts Contract initiation condition assessments Interim assessment to assess the quality of service **Transit Vehicles:** Carrying out regular maintenance activities on all vehicles and equipment as per manufacturer's recommendations for optimum performance and lifecycle	Deficiencies may not be identified during inspections due to concealed components or difficult access. Increased lifecycle costs if maintenance is done improperly or not as scheduled. It may contribute to premature asset failure service disruptions or pose health and safety risks. Customer dissatisfaction with quality, safety or accessibility of facilities.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Reactive maintenance for circumstances not easily mitigated (e.g. vehicle accidents, faster than anticipated breakdown) Tracking maintenance activities in order to continue to improve. Target is to minimize unplanned, non-standardized work. Empowering certified staff to make decisions on elective repairs (under $1,000) in order to ensure continuity of service and fewer breakdowns while in service	
Renewal / Rehabilitation Activities Significant repairs designed to extend the life of the asset	**Transit Facilities:** Mid-life Renewal of facilities and major overhauls and modernization of equipment to support department service **Transit Vehicles:** Regular preventative maintenance programs assist in determining renewals/rehabilitation required.	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Major overhauls or reconditioning are very costly and generally do not add enough extended life to add value. Review opportunities to repurpose add-on equipment, attachments and outfitting past the lifecycle of the parent asset	Changes to asset use as well as modernizing systems and adjusting to increasing levels of customer and employee service. These are unknown and could lead to large expenditures.
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option	**Transit Facilities:** Demolition and Replacement Major renovation, including large additions and property acquisition **Transit Vehicles:** Optimal asset lifecycle assessed to determine the timing of replacement that minimizes maintenance/repair and maximizes salvage value. Communication with the Supervisor of Fleet Services of end-of-life assets to help with service and repair decisions to mitigate non-value-added expenditures	Lead to inefficiencies and substandard services for both staff and customers.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	**Transit Facilities:** Facility Master Plans and Department Plans Community Outreach / Customer Engagement Corporate Energy and Emissions Plans Master Maintenance Plans Capital Asset and Lifecycle Renewal Plans **Transit Vehicles:** Lifecycle Management Review – Condition Assessment at the end of life Review and benchmarking of lifecycles Test extending lifecycle to review impact Cost review on assets past lifecycle	Asset deterioration is over- or under-estimated. Inaccurate growth numbers and estimation of funding.
Expansion / Service Enhancements Planned activities to improve an asset's capacity, quality and system reliability	**Transit Facilities:** Facility Upgrades and Service Enhancements New Facilities and Buildings Building and or Property Acquisition	Growth activities are delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Leasing Additional Buildings and Properties **Transit Vehicles:** Post-delivery inspection to confirm that the vehicle arrived as specified End-user training specific to the equipment to ensure proper operations and operator maintenance (cleaning, greasing, etc.) Consider extended warranties when available and service agreements (e.g. rustproofing) Procurement practices to emphasize quality assets Growth and expansion are guided by, but not limited to: • Burlington's Strategic Plan 2015-2040 • 2018-2022 Burlington's Plan: From Vision to Focus • Burlington's Integrated Mobility Plan • Development Charges Background Study • Green Fleet Strategy	

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	• Provincial Audit & Accountability Review Capital growth projects are identified by City of Burlington Development Charges Background Study (subject to Development Charges Act, 1997 requirements)	
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	**Transit Facilities:** Decommissioning Sale Change of Ownership Consolidation of Buildings Repurposing Buildings **Transit Vehicles:** Optimal lifecycle analysis completed for each asset prior to replacement. Salvage amount can vary, but an average of 15% of replacement value is consistently achieved.	Improper disposal can lead to environmental impacts and expenses.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Planning with an auction to ensure staggering of similar assets to maximize return and not flood the market with availability Planning with auction to target seasonal disposal of assets when demand is high	

4.0 Risk

4.1 Internal Risk

Risk, as discussed in Section 5, is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure X Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

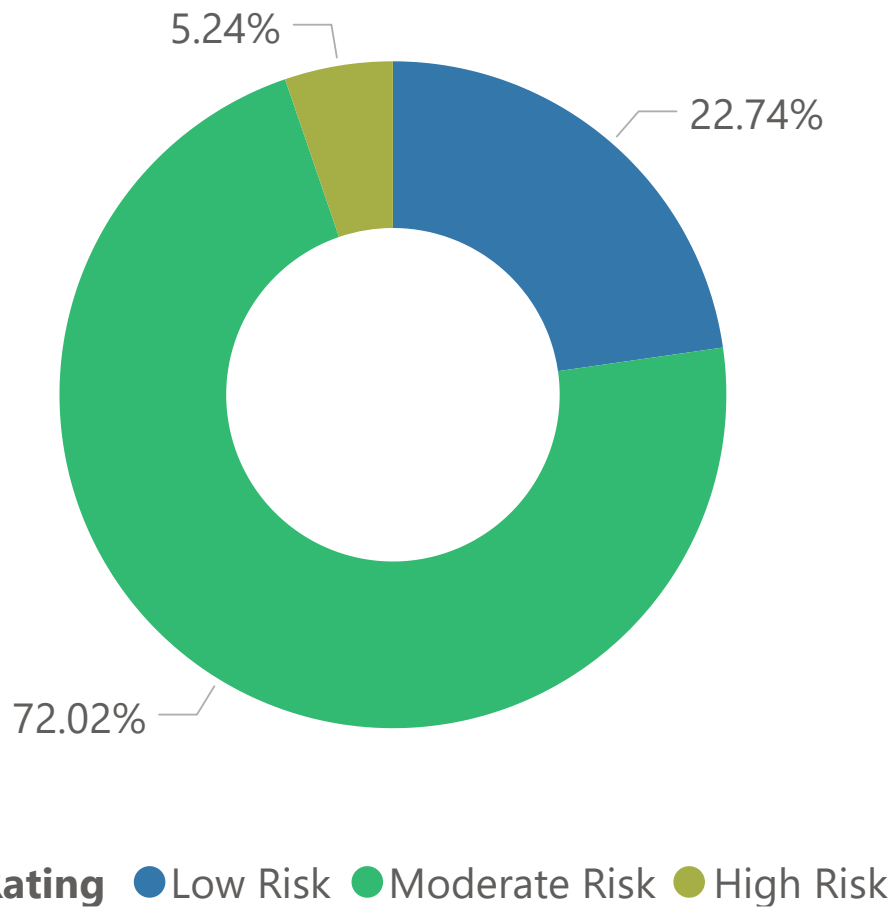
The triple bottom line **consequence of failure** factors are presented in **Table 6** for social, financial and environmental consequences.

Table 6: Consequence of Failure Factors – Transit

Social	Financial	Environmental
• Road Classification • Route criticality • Asset has regulated inspection requirements • Within CH Regulation Limit	• Replacement Value	• Proximity to water

See **Figure 1,** which presents the percentage of assets (weighted) for Transit, with 72% of assets assigned a Moderate Risk rating. This is due in part to the age of Transit infrastructure and the criticality of Transit assets for service delivery.

Figure 1: Risk Rating by Replacement Value – Transit



4.2 External Risk

The following external risks have been identified for the Transit service area:

- Reduced fleet service life or increased maintenance requirements due to extended or prolonged use during weather-related events;
- Inflation, tariffs and supply-chain issues; and
- Decreased asset capacity/performance due to growth.



City of Burlington

Asset Management Plan 2025

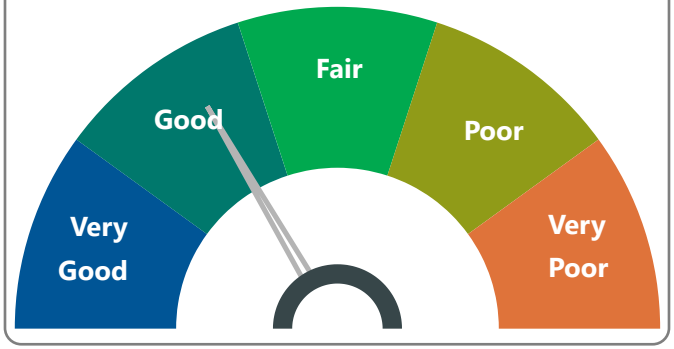
Appendix B-8 Fire

State of Fire Infrastructure

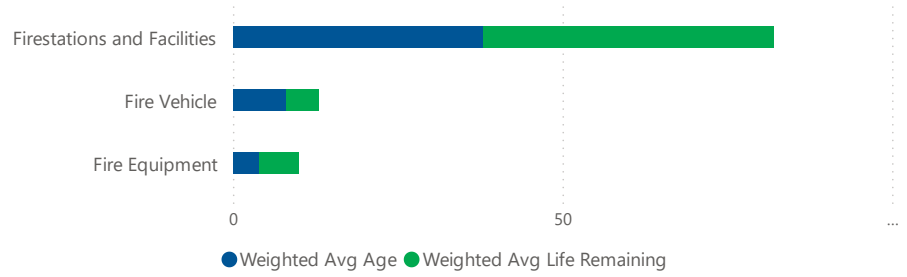
The City of Burlington is committed to delivering effective and efficient fire protection services.

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$160.39M	Good	**Moderate**	Fire Equipment	B	32 | 68 years
			Fire Vehicle	A	
			Firestations and Facilities	B	

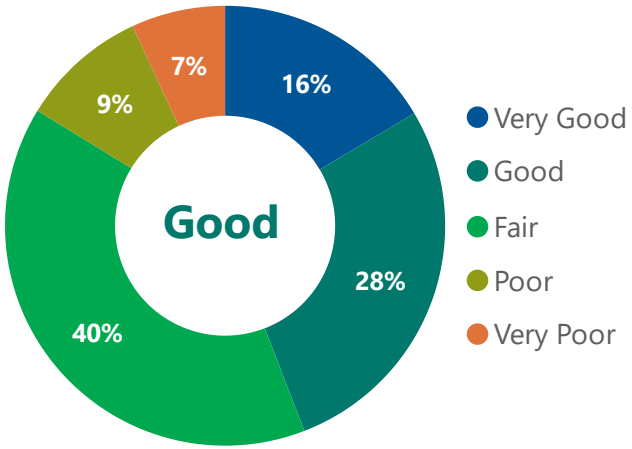
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

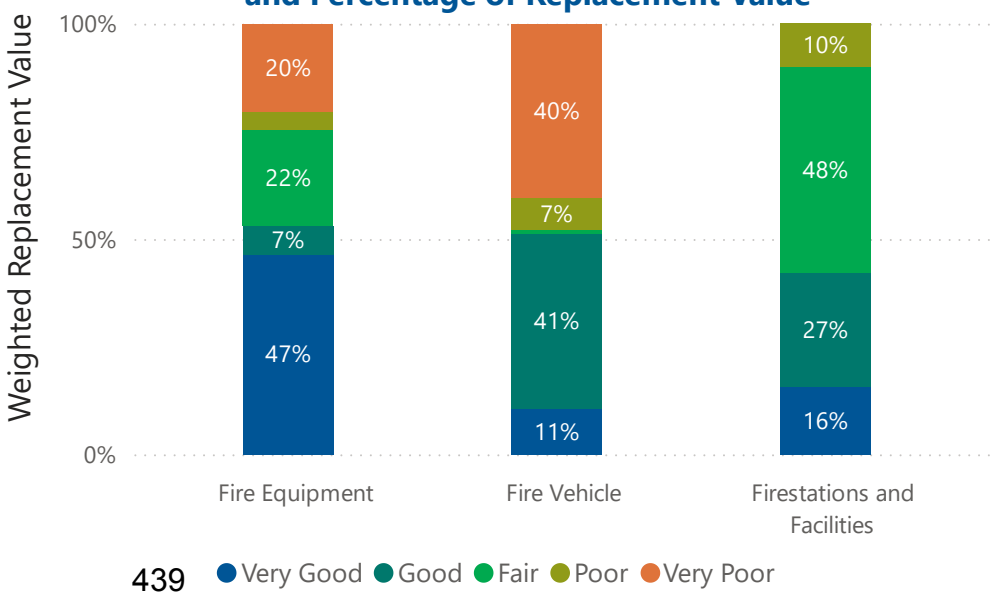


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Fire

The City of Burlington is committed to delivering effective and efficient fire protection services to prevent and mitigate fire loss, injury and death and to promote firefighter safety within the community. To support these services, the City is required to maintain many facilities, vehicles, and equipment. These assets range from specialized stations and training facilities and fire and rescue vehicles to specialized equipment and emergency apparatuses.

In 2022, the City developed a series of strategic priorities and actions for Fire Service Protection services as part of the completion of a 10-year Fire Master Plan (FMP). The FMP guides the delivery of fire prevention, education and protection services through a strategic framework and recommended action plan to support service delivery.

1.0 State of the Local Infrastructure

Ensuring public safety through emergency response and fire prevention is a fundamental expectation of many members of the community. This section summarizes the portfolio of assets associated with the various fire assets managed by the City.

As shown in **Table 1**, the City of Burlington's portfolio of infrastructure assets for Fire is valued at $160.4 million, which is comprised of a mixture of Fire Stations valued at $128.8 million and Vehicles and Equipment valued at $32 million. This replacement value is derived from both historic acquisition costs and from individual system-level asset/component costs within the facility management system.

The total replacement value for the Fire assets is $160.4 million, the average age is 32 years, the average service life is 68 years, and the average OSI condition is Good.

See **Table 1** for the asset inventory and valuation for each asset class as well as average age, average service and average OSI condition.

Table 1: Asset Inventory and Valuation – Fire

Asset Class	Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Fire	Equipment	various	$8.4 M	4	10	Good
Fire	Vehicles	38	$23.2 M	8	12	Fair
Fire	Stations	8	$128.8 M	38	82	Good

The Overall Service Index (OSI) for Fire assets is determined by different factors, depending on the type of asset. For Fire Vehicle and Equipment assets, the OSI Condition is determined by calculating the percentage of life remaining based on the age and estimated service life of the asset. For the Fire Stations, an OSI condition score used both age and the industry-standard Facility Condition Index (FCI) to describe the condition state of the asset. The FCI does not represent a visually assessed condition of the facility but rather is the ratio between the like-for-like repair/renewal needs and the current replacement value of the asset. On its own, it does not describe the performance or capacity of the facility to deliver the desired level of service.

2.0 Levels of Service

The City's inventory of Fire assets includes 8 Stations, 38 Vehicles, and various Equipment.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2024) for the Fire service area.

Table 2: Standardized Corporate LOS Metrics – Fire

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	2.42%
Technical LOS	SOGR Backlog	$6,523,000
Community LOS	% Poor or Very Poor	16.24%

The City has identified Community Levels of Service and Technical Levels of Service, which are presented in **Table 3** and

Table 4.

Table 3: Community Levels of Service – Fire

Service Attribute	Performance Metric	Current Performance (2024)
Scope	Number of fire stations	8
Scope	Number of fire vehicles	38

Table 4: Technical Levels of Service – Fire

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Percentage of Fire facilities in Good or Very Good condition	70.67%
Reliability	Percentage of frontline emergency response apparatus less than 10 years old (NFPA-informed target replacement age)	61%
Reliability	Average age of emergency response apparatus	10.11 years
Reliability	Percentage of annual uptime for emergency response apparatus	95%
Reliability	Number of annual engine hours for frontline emergency response apparatus	9,674
Environmental Sustainability	Annual GHG emissions per square meter of stations (city-wide portfolio average)	34,072 g CO_2/m^2

3.0 Asset Management Strategy

Table 5: Lifecycle Activities – Fire

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	**Fire Stations and Facilities:** Inspections through corporate contracts General facility maintenance and scheduled overhauls Contract initiation condition assessments Interim assessment to assess the quality of service **Vehicles and Equipment:** Fire Industry National Fire Protection Association (NFPA) 1911 is the leading standard for the inspection, maintenance, testing, refurbishing and retirement of in-service emergency vehicles. This Standard is referenced as part of the department's preventative maintenance and lifecycle replacement plan. Fire department emergency and non-emergency vehicles are included in the	Deficiencies are not identified through inspections due to concealed components or difficult access. Increased lifecycle costs if maintenance is done improperly or not as scheduled. Incorrectly planned maintenance activities can lead to premature asset failure or impacts on levels of service.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	department's preventative maintenance (PM) program as a proactive measure to maintain and repair the fleet to ensure a ready-to-respond capacity. Vehicle operator daily vehicle checks are completed, and defects are reported to fire department specialized emergency vehicle technicians (EVT) who coordinate the required repairs in-house or outsourced based on the need. Dedicated reserve fleets are included in the PM program to allow extended downtime for longer-duration repairs and/or replacements. Third party testing is completed annually or following any major repair on all fire pumps, ground ladders and aerial devices. Most recommended repairs resulting from inspections are completed in-house. All aerial devices undergo non-destructive testing (NDT) every 5 years or following any major repairs.	

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	**Fire Stations and Facilities:** Mid-life renewal of facilities and major overhauls and modernization of equipment to support department service **Vehicles and Equipment:** Fleet and equipment are replaced according to NFPA standards and certification through the Fire Underwriters Survey (FUS), with standards under the Automobile Fire Fighting Apparatus (ULCS-515) Fire fleets are periodically rotated through eight (8) fire station locations to allow for more frequently used vehicles to be rotated with less frequently used vehicles, extending asset life and maintaining service levels. Non-destructive testing is conducted for aerial (ladder) fleet on an annual basis, and any required repairs are completed to maintain and extend the life of the asset (NFPA 1911)	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled. Changes to asset use, as well as modernizing systems and adjusting to increasing levels of customer and employee service, are unknown and could lead to large expenditures.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Significant repairs designed to extend the life of an asset	
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/rehab is no longer an option	**Fire Stations and Facilities:** Demolition and replacement Major renovation, including large additions and property acquisition **Vehicles and Equipment:** Fleet and equipment are replaced according to NFPA standards and certification through the Fire Underwriters Survey (FUS), with standards under the Automobile Fire Fighting Apparatus (ULCS-515) Fire Industry National Fire Protection Association (NFPA) 1911 is the leading standard for the retirement and lifecycle planning of fire apparatus. NFPA 1901 is the leading standard outlining requirements and certification for new fire apparatus, including the required certification required to meet Fire Underwriters Survey (FUS)	Leads to inefficiencies and substandard services for both customers and staff.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	requirements to ensure that these assets have a positive effect on fire insurance grading public fire protection classification Emergency response apparatus is designed and built to meet the requirements of NFPA 1901 and Standard for Automobile Fire Fighting Apparatus ULCS-515 current editions. Fire department fleets are included in the City's ten (10) year capital budget lifecycle replacement plan. They are replaced based on NFPA-leading standards, industry practices, and manufacturers' recommended use and condition assessments. Fire department fleets are used until the end of estimated service life, and condition requires replacement, legislative requirements and/or leading practice change or service delivery enhancements are approved by the council. Condition assessments are completed annually on all emergency response vehicles, and replacement criteria include estimated service	

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	lifecycle, engine hours, kilometers travelled and anticipated future maintenance costs.	
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	**Fire Stations and Facilities:** Facility condition assessments Facility master plans Detailed condition assessments Community outreach/customer engagement Fire Master Plan Corporate Energy and Emissions Plan **Vehicles and Equipment:** Fire department fleet and equipment assets are maintained to industry-leading practices, or higher, to ensure reliable delivery of fire emergency and non-emergency services. Fleet and equipment receive detailed and planned preventative maintenance inspections by fire operators and emergency vehicle technicians.	Asset deterioration is over or underestimated. Inaccurate growth numbers and estimation of funding. Fire safety knowledge and awareness among the public could be impacted negatively.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Included as part of the Fire department, the fleets' lifecycle replacement strategy is a green strategy which encourages fleet replacement with environmentally green solutions when and where applicable Fire belongs to a fleet and equipment committee with representation from across the corporation to ensure the needs of the department and community are being met.	
Expansion Activities Planned activities to improve an asset's capacity, quality and system reliability	**Fire Stations and Facilities:** Facility upgrades, service enhancements and growth activities New facilities and buildings Building and/or property acquisition Growth and expansions are guided by but not limited to Burlington's Strategic Plan 2015-2040 and 2018-2022 Burlington's Plan: Vison to Focus **Vehicles and Equipment:**	Acquisition of new assets is delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth. Master Plans may overestimate or underestimate required expansions to accommodate for growth.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Fleet and equipment expansion/enhancements are implemented to ensure approved service levels are maintained and continue to meet the needs of a growing and changing city Evaluation of urban density growth and expansion, including building occupancy and height, are continually evaluated Environmental assessment and adoption into fleet assets and replacement Adopt technology to enhance or maintain service level	
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality	**Fire Stations and Facilities:** Decommissioning Sale Change of ownership Consolidation of buildings Repurposing buildings **Vehicles and Equipment:**	Improper disposal can lead to environmental impacts and expenses.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	At the end of estimated service life, fire fleet and equipment are sold or disposed of following City policy, applicable regulations and environmental standards.	

4.0 Risk

4.1 Internal Risk

As discussed in Section 5, Risk is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure X Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

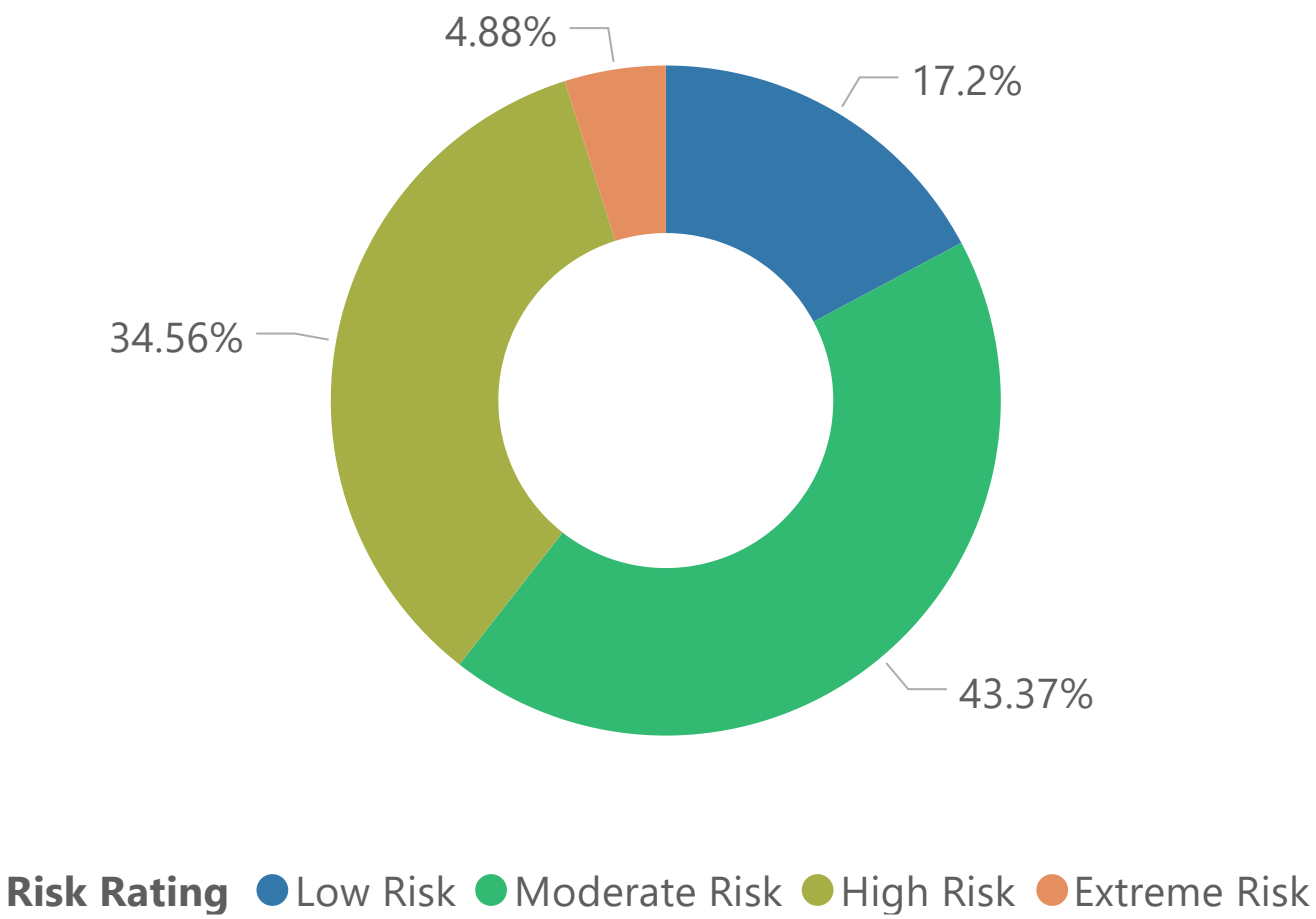
The triple bottom line **consequence of failure factors** are presented in **Table 6** for social, financial and environmental consequences.

Table 6: Consequence of Failure Factors – Fire

Social	Financial	Environmental
• Asset Criticality	• Replacement Value	• Hazardous materials handling

The overall risk profile, shown in **Figure 1**, is Moderate for Fire, with 38% of assets assigned a High-Risk rating. This is due to an aging Fire Vehicle inventory and the high criticality nature of most Fire assets, given their role in emergency and fire response.

Figure 1: Risk Rating by Replacement Value – Fire



4.2 External Risk

The following external risks have been identified for the Fire service area:

- Reduced fleet service life or increased maintenance requirements due to extended use as a response to population and growth increases; and
- Inflation, tariffs and supply-chain issues.



City of Burlington

Asset Management Plan 2025

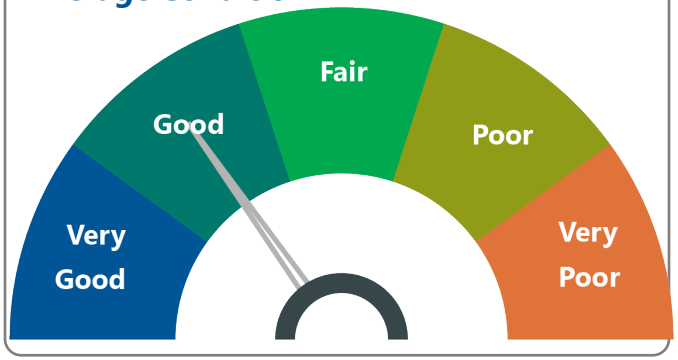
Appendix B-9 Parking

State of Parking Infrastructure

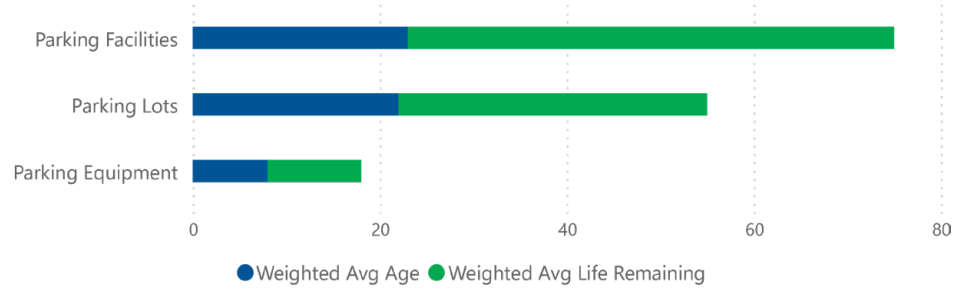
The City of Burlington is committed to efficiently providing safe and convenient parking services at an appropriate quality that is accessible to all residents.

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$148.04M	Good	Moderate	Parking Equipment	B	22 | 60 years
			Parking Facilities	B	
			Parking Lots	B	

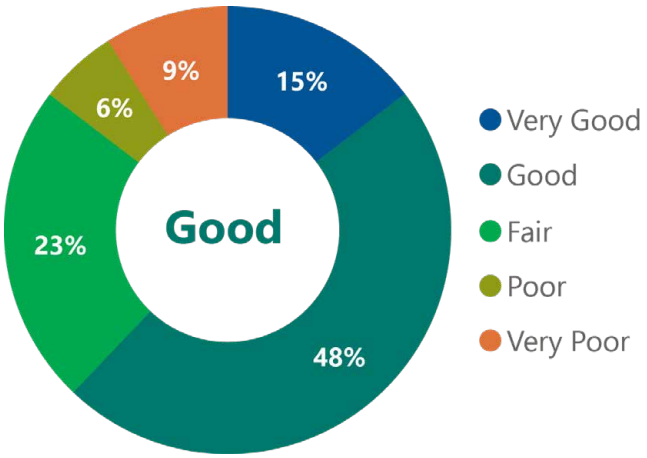
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

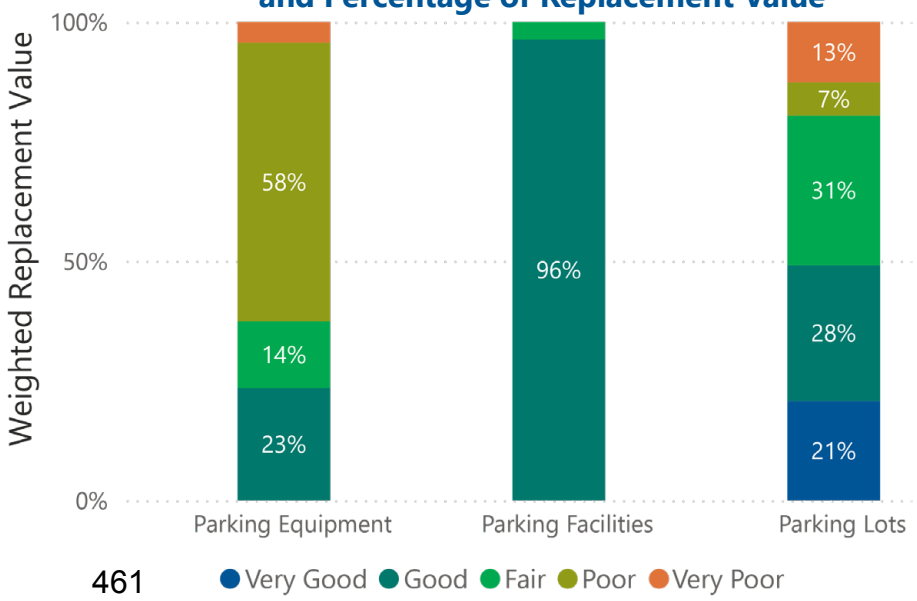


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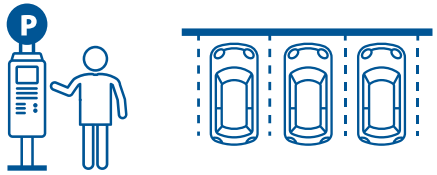
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Parking

The City of Burlington owns and maintains parking infrastructure within the downcore core and at many City-owned facilities and park locations. As a non-profit corporation, the City provides controlled rate parking both short-term (on-street) and long-term (off-street) and returns the revenue generation into a reserve fund for parking renewal needs. This supply supports Burlington's business, commercial, and institutional services as well as entertainment venues. The City works to balance the general need to provide accessible and convenient parking whilst ensuring traffic flows, emergency vehicle access and accessible parking for permitted users (as per the City's Strategic Plan, 2.1 – Increased Transportation Flows and Connectivity).

The City introduced occupancy sensors at all City-owned parking lots and on-street parking spaces. Burlington is one of the first cities in Canada to utilize this technology, which keeps track of occupied and available parking spaces and displays real-time information to citizens and visitors, simplifying the process of finding an available parking space. The City also provides 28 public electric vehicle charging stations in the Downtown Core and at various City-owned public facilities.

A Downtown Parking Plan is currently underway, scheduled for completion in 2025. This will include a parking inventory and utilization review, to be followed by a detailed analysis of future parking needs and the development of a strategic plan for parking operations and management.

1.0 State of Local Infrastructure

Having dependable and available parking facilities is an important component of the City's accessibility for both citizens and visitors. This section summarizes the portfolio of infrastructure assets associated with the various parking services managed by the City.

As shown in **Table 1** the City of Burlington's portfolio of infrastructure assets for Parking services is $148 million, which is comprised of Parking Lots valued at $104 million, Equipment valued at $2 million, and Parking Facilities valued at $41 million. This replacement value is derived from individual system-level assets/components within the facility management system and site amenities associated with each facility, such as surface/corporate lots, downtown lots, parking garages/offices, parking services building, pay stations, and other equipment.

The total replacement value for the Parking assets is $148 million, the average age is 22 years, the average service life is 60 years, and the average OSI condition is Good.

See **Table 1** for the asset inventory and valuation for each asset as well as average age, average service and average OSI condition.

Table 1: Asset Inventory and Valuation – Parking

Asset Class	Asset Type	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Parking Equipment	EV Chargers, Pay stations, Signage	$2.1 M	8	18	Fair
Parking Facilities	Parking Garage	$40.3 M	21	75	Good
Parking Facilities	Parking Services Building	$1.5 M	74	75	Fair
Parking Lots	Corporate Lots	$97.3 M	23	54	Good
Parking Lots	Downtown Lots	$6.8 M	15	60	Good

For facilities, the OSI was partly derived from the industry standard performance benchmark rating, called the Facility Condition Index (FCI). An FCI does not represent a visually assessed condition of the facility, but rather is the ratio between the like-for-like repair/renewal needs, and the current replacement value of the asset. A limitation of FCI is that it does not describe the facility's performance or capacity to deliver the desired service, and its accuracy is dependent on the total current replacement value calculated. For this reason, the Overall Service Index (OSI) for facility reporting in this AMP uses both FCI and facility age as criteria, with age being used as a proxy for facility performance and/or capacity.

For the remaining parking infrastructure, the OSI condition was determined either by age (as a proportion of its estimated service life), assessment, or through professional judgment by City staff.

2.0 Levels of Service

The City's inventory of Parking assets includes Parking Lots, Parking Facilities and Equipment that includes EV chargers, pay stations and signage owned by the City. The lowest average age is Parking Equipment at 8 years and the highest average age is the Parking Services Building at 74 years.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2024) for Parking assets.

Table 2: Standardized Corporate LOS Metrics – Parking

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	1.13%
Technical LOS	SOGR Backlog	$7,653,000
Community LOS	% Poor or Very Poor	14.64%

The City has identified Community Levels of Service (LOS) and Technical Levels of Service, which are presented in **Table 3** and **Table 4**.

Table 3: Community Levels of Service – Parking

Service Attribute	Performance Metric	Current Performance (2024)
Reliability	Percentage of parking assets meeting City quality standards	62.13%
Availability	Percentage utilization of publicly available EV chargers (time used vs time available)	22%

Table 4: Technical Levels of Service – Parking

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Average Facility Condition Index (FCI)	0.05 (Good)
Availability	Parking revenue as a percentage of total parking operations costs (downtime)	2.27%
Availability	Percentage of scheduled operational hours for parking machines in-service (up-time)	97.20%
Reliability	Percentage of parking lots in poor and very poor condition (downtown, revenue-generating)	9.50%
Reliability	Percentage of corporate parking lots in poor and very poor condition (non-revenue generating)	13.53%
Reliability	Percentage of parking equipment in poor and very poor condition	4.31%

3.0 Asset Management Strategy

Table 5: Lifecycle Activities – Parking

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	Scheduled inspections of parking lots Complete Routine Maintenance	Increased lifecycle costs if maintenance is done improperly or not as scheduled. May contribute to premature asset failure, service disruptions, or pose health and safety risks. Customer dissatisfaction with the condition and accessibility of Facilities.
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	**Parking Lots:** Minor Reconstruction Resurfacing **Parking Facilities:** Mid-life Renewal	Renewal/rehab activities may not extend asset life as much as expected, leading to premature asset failure or the need for another renewal/rehab activity. Increased lifecycle costs if renewal/rehab activities are done improperly or not as scheduled. Changes to asset use, as well as modernizing systems and adjusting to increasing levels of customer and employee service.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option	**Parking Lots:** Full Reconstruction	Delays in construction projects may result in health and safety risks, higher costs, longer service disruption and customer dissatisfaction.
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	**Parking Lots:** Corporate Parking Lot Assessments Downtown Parking Lot Inspection / Assessments	Asset deterioration is over or underestimated. Inaccurate growth numbers and estimation of funding.
Expansion / Service Enhancements Planned activities to improve an asset's capacity, quality, and system reliability.	Property Acquisition and lot expansions Parking lot modifications in line with future growth and expansion planning to accommodate other provided municipal services Electrification of fleet vehicles as it relates to charging stations	Growth activities are delayed or cancelled, resulting in the system being unable to accommodate for population and employment growth. Master Plans may overestimate or underestimate required road expansions to accommodate for growth.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Disposal Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality.	Removal and or repurpose Resale	Improper disposal can lead to environmental impacts and expenses.

4.0 Risk

4.1 Internal Risk

As discussed in Section 5, Risk is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure Score X Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

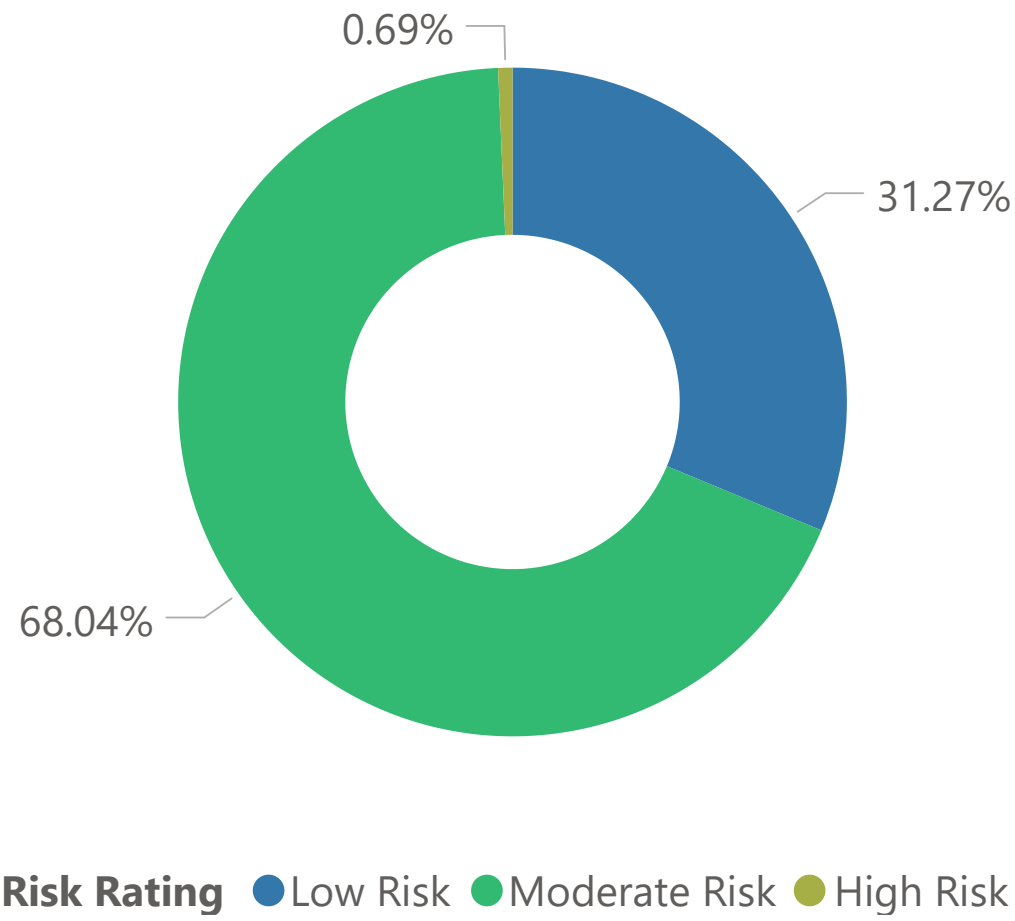
The triple bottom line **consequence of failure factors** are presented in **Table 6** for social, financial and environmental consequences.

Table 6: Consequence of Failure Factors – Parking

Social	Financial	Environmental
• Asset Criticality	• Replacement Value	N/A

The overall risk profile, shown in **Figure 1** below, is Moderate for Parking, with 68% of assets assigned a Moderate risk rating due to their age.

Figure 1: Risk Rating by Replacement Value – Parking



4.2 External Risk

The following external risks have been identified for the Parking service area:

- Reduced pavement lifespans or increased maintenance requirements due to extreme heat, ice or precipitation events; and
- Inflation, tariffs and supply-chain issues.



City of Burlington

Asset Management Plan 2025

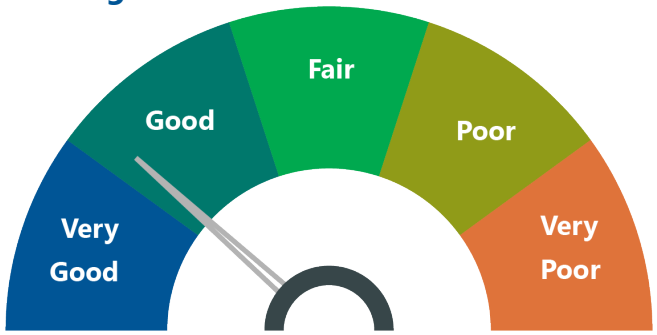
Appendix B-10 Information Technology

State of Information Technology Infrastructure

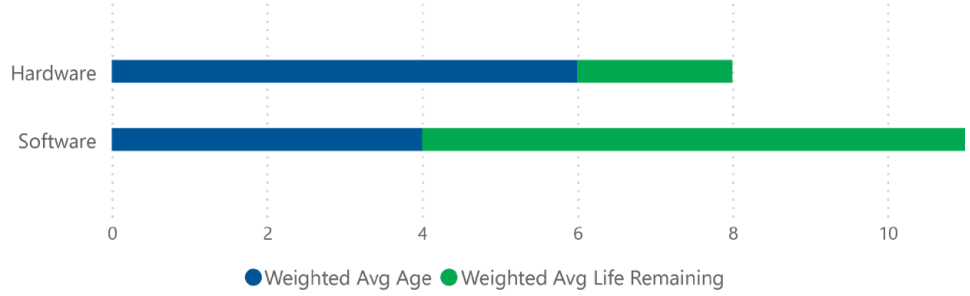
The City of Burlington is committed to the upkeep of its Information Technology, managed by Burling Digital Services (BDS).

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$88.83M	Good	**Moderate**	Hardware	B	4 | 10 years
			Software	B	

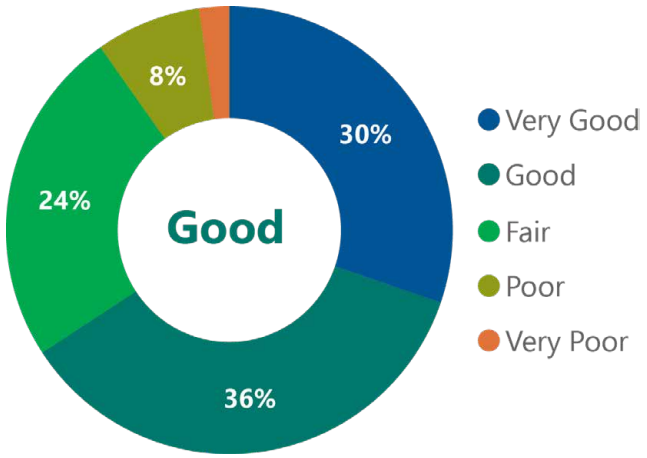
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

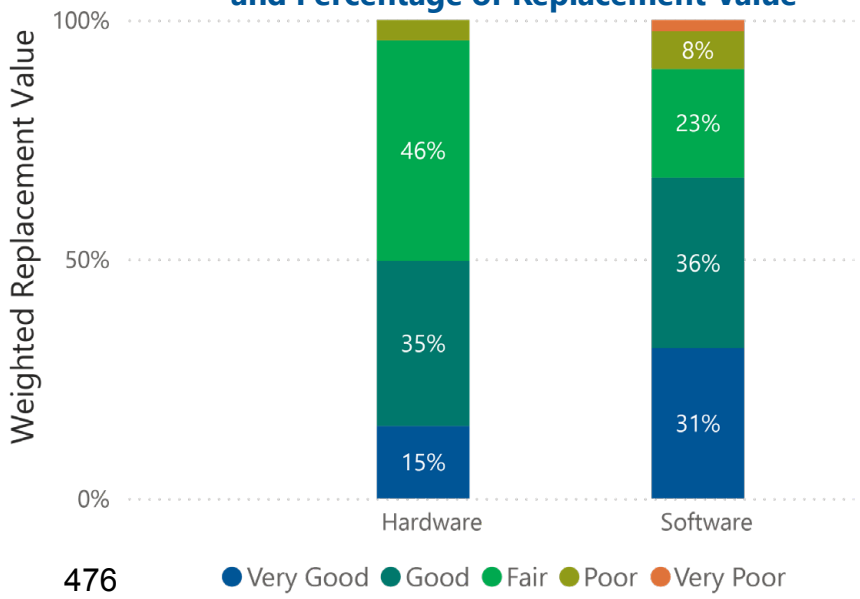


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Information Technology

Information Technology is managed by Burlington Digital Services (BDS) department. BDS provides professional consulting services by proactively supporting the corporation's business areas with technology solutions that meet business objectives. This service contributes to the City's Strategic Plan, 4.1 Good Governance, and 4.2 Community Building through Culture and Community Activities.

1.0 State of Local Infrastructure

BDS delivers desktop hardware and software support, business application management and support, online corporate services and bookings, data management and business intelligence, security, training and general consulting. BDS Services is also responsible for managing the City's data centers, network, internet access, email and telephone system.

As shown in **Table 1**, the City of Burlington's portfolio of facilities for Information Technology is valued at $88.8 million, which is comprised of a mixture of Hardware Systems and Devices valued at $6.5 million and Software Applications valued at $82.5 million. This replacement value is derived from individual system-level assets/components within the facility management system and site amenities associated with each facility, such as major, minor, hosted solutions, servers, telephones, switches and workstations.

The total replacement value for the Information Technology assets is $88.8 million, the average age is 4 years, the average service life is 10 years, and the average OSI condition is Good.

See **Table 1** for the asset inventory and valuation for each asset class and average age, average service, and OSI condition.

Table 1: Asset Inventory and Valuation – Information Technology

Asset Class	Asset Type	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Hardware	Major	$0.5 M	0	5	Very Good
Hardware	Servers	$2.0 M	5	6	Good
Hardware	Switches	$1.0 M	5	5	Good
Hardware	Telephones	$1.0 M	6	10	Good
Hardware	Workstations	$2.0 M	10	5	Good
Software	Hosted Solutions	$16.3 M	6	11	Good
Software	Major	$52.4 M	2	12	Very Good
Software	Minor	$13.8 M	7	5	Fair

Burlington's computer network extends to over forty (40) corporate building locations across the City. A secure internet connection provides remote access to the City's network for those staff working from other locations. BDS maintains an inventory of its hardware and software assets in a variety of applications and data systems. Given the short lifespan of IT assets, the replacement values maintained by the City are based on the most recent purchase price or license fee for an asset. However, given the dynamic schedule for both Software and Hardware assets, the City also updates asset values based on changing market prices from its vendors and suppliers. As more software solutions migrate to cloud-based servers from traditional on-premises solutions, the approach to lifecycle management and renewal of these assets is changing as well.

Asset condition for Information Technology was determined by BDS staff with consideration of the age and estimated service life.

2.0 Levels of Service

The City's inventory of Information Technology assets includes major, minor, hosted solutions, servers, telephones, switches and workstations. The highest average age is for Hardware at 10 years, and the lowest is for Software at 2 years.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2024) for Information Technology assets.

Table 2: Standardized Corporate LOS Metrics – Information Technology

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	3.11%
Technical LOS	SOGR Backlog	$3,754,000
Community LOS	% Poor or Very Poor	9.79%

The City has identified Community Levels of Service (LOS) and Technical Levels of Service, which are presented in **Table 3** and **Table 4.**

Table 3: Community Levels of Service – Information Technology

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Percentage of system downtime	0.06%
Reliability	Percentage of tickets/incidents resolved on time according to existing service agreements	65.38%
Availability	Number of devices supported (PCs and mobile devices)	1880

Table 4: Technical Levels of Service – Information Technology

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Percentage of security renewals completed as scheduled	100%
Quality	Percentage of hardware renewals completed as scheduled	88.50%
Quality	Percentage of software renewals completed as scheduled	93%
Reliability	Number of Service Desk Tickets per year	5639
Reliability	Number of significant security measures implemented in previous 12 months	12
Reliability	Operational uptime of critical systems (percentage)	99.94%
Availability	Successful deployment of releases (percentage)	98.82%

3.0 Asset Management Strategy

Table 5: Lifecycle Activities – Information Technology

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repairs and activities associated with unexpected events.	IT Staff, service leads and users of City hardware and software assets provide asset concerns on a proactive basis through alerting applications, routine monitoring and preventative maintenance. Under special circumstances, service leads manage assets under their control, such as the Traffic Control system. Concerns are also addressed through routine maintenance programs supported by the user to the IT Service Desk. Major and Minor Software applications can continue to provide service beyond their expected lifecycle if maintenance for the system is effective and ongoing.	Failure to complete planned maintenance can lead to premature asset failure and disruption of service. Urgent work requests may not be supported if sufficient resources are not allocated to ensure IT Service coverage. Unanticipated loss of vendor support will result in service disruptions.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Maintain communication with existing system vendors to ensure/forecast continuous support indefinitely.	
Renewal/ Rehab Activities Significant repairs designed to extend the life of the asset	Proactive rehabilitation of City software programs Infrastructure may undergo both Software and hardware upgrades to keep current and fully supported End-user devices and applications are generally not rehabilitated Assumption that all hosted solutions will utilize full contract extensions at least once before renewal or replacement is required	Incorrect assumptions about renewal or rehabilitation activities may result in increased funding needs and premature replacement. Failure to complete renewal or rehabilitation can lead to premature asset failure and disruption of service.
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option.	Scheduled replacement programs for IT infrastructure are in place. Assets are replaced when they are no longer meeting operational requirements or are reaching the end of support. When IT applications are no longer supported by the vendor and ITS,	Failure to complete or initiate replacement activities in time can lead to disruption of service.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	generally, they would be replaced with a new application. End-user devices and applications are replaced when the asset reaches the end of its estimated service life, or an unexpected event occurs with the asset.	
Non-Infrastructure Activities Actions or policies that can lower costs or extend service lives	Coordinate business needs with anticipated IT support to determine prioritization of IT asset replacements Continuous focus to ensure application and software assets are considered "in support" to mitigate potential malware / cyber-attacks and ensure the asset is operating efficiently for individuals using the asset	Failure to understand corporate needs or security risks may result in loss of productivity or risk of cyber incidents.
Expansion / Service Enhancements Planned activities to improve an asset's capacity, quality, and system reliability.	Expansion activities of applications and Software include additional licensing due to staff growth, needs or implementation of new modules within the solution.	Lack of resources or delays in expansion activities may result in loss of productivity, decrease in levels of service, or disruption of service.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Infrastructure services may be expanded to support new facilities or expanded services in existing facilities. End-user assets may be expanded to equip new users or address new user requirements. Infrastructure components may be expanded by adding capacity (e.g. memory, ports, hard drives)	
Disposal Activities associated with disposing of an asset once it has reached the end of its estimated service life or is otherwise no longer needed by the municipality.	IT Services works with authorized vendors to dispose of technology components per government-mandated standards to ensure the assets are properly disposed. Some decommissioned equipment with market value goes through a data sanitization (wipe process) and is sold for resale purposes. Server drives are destroyed to ensure no data leakage.	Failure to properly dispose of hardware and software assets may result in risk of data security breaches or loss of resale revenue.

4.0 Risk

4.1 Internal Risk

Risk, as discussed in Section 5, is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure Score X Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

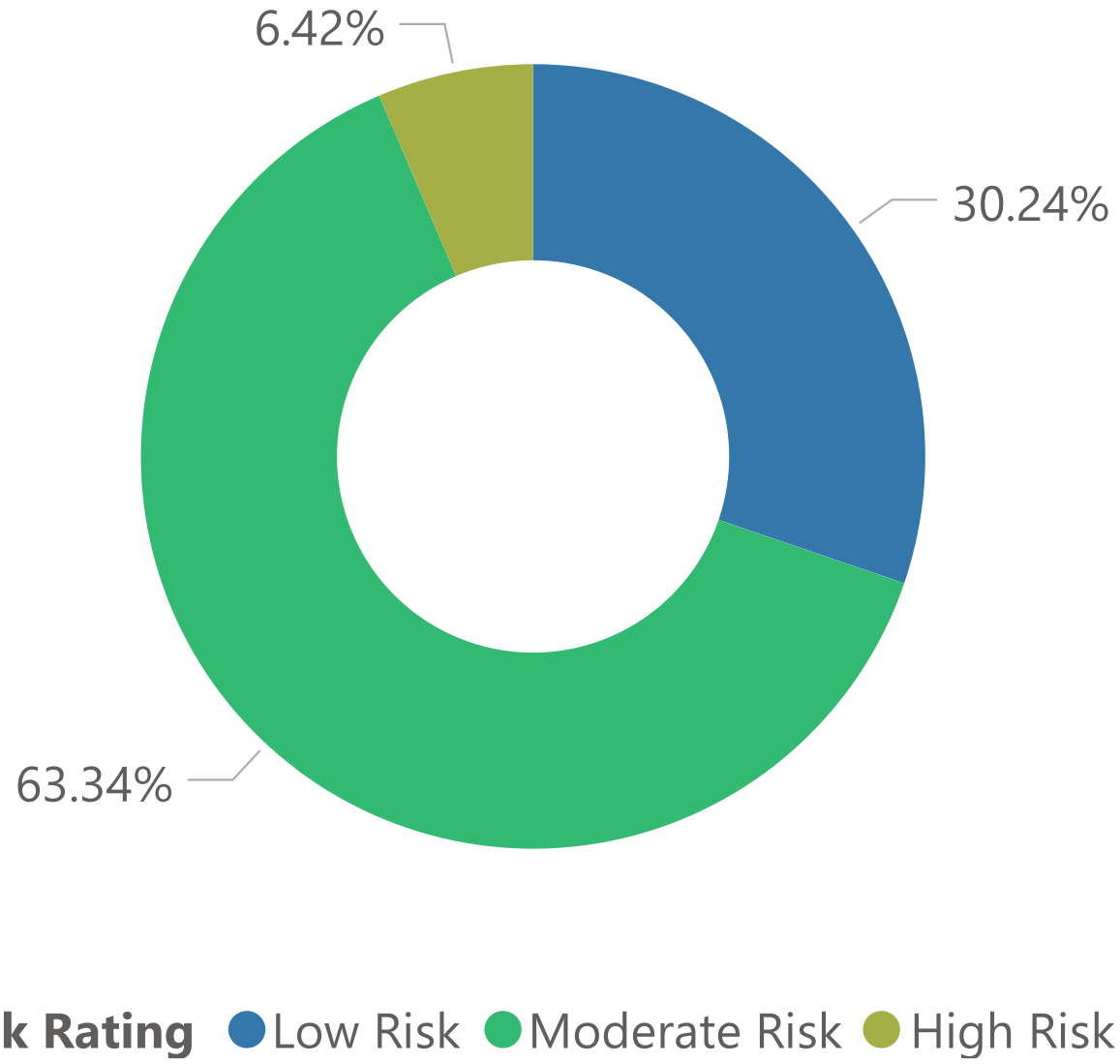
The triple bottom line **consequence of failure factors** are presented in **Table 6** for social, financial and environmental consequences.

Table 6: Consequence of Failure Factors – Information Technology

Social	Financial	Environmental
• Asset criticality	• Replacement Value • Incident Recovery	N/A

The overall risk profile, shown in **Figure 1** is Moderate, with 63.34% of assets assigned a Moderate risk rating.

Figure 1: Risk Rating by Replacement Value – Information Technology



4.2 External Risk

The following external risks have been identified for the Information Technology service area:

- Inflation, supply-chain disruptions, tariffs;
- Power failures due to extreme weather; and
- Disruptions or incidents from third-party providers.



City of Burlington

Asset Management Plan 2025

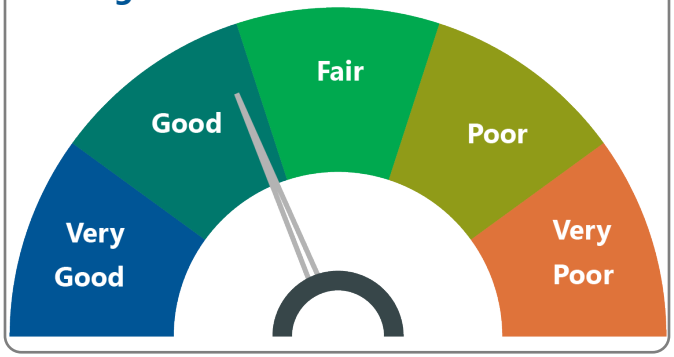
Appendix B-11 Corporate Fleet

State of Corporate Fleet Infrastructure

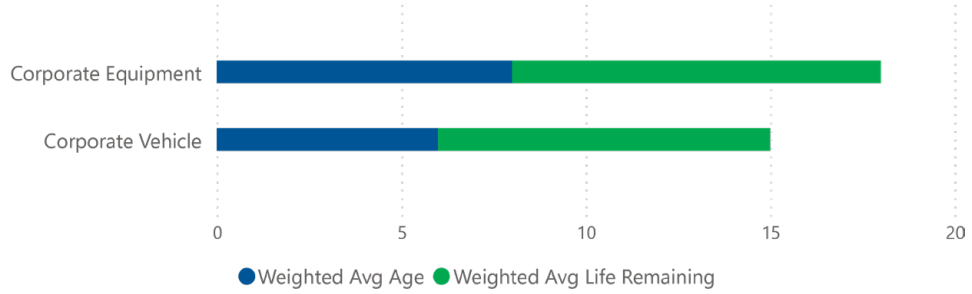
The City of Burlington is committed to the upkeep of its corporate fleet as used by Roads, Parks, and Forestry (RPF).

Replacement Value	Average Condition	Risk Rating	Data Confidence		Average Age | Service Life
$51.92M	Good	**Moderate**	Equipment	B	7 | 17 years
			Vehicle	A	

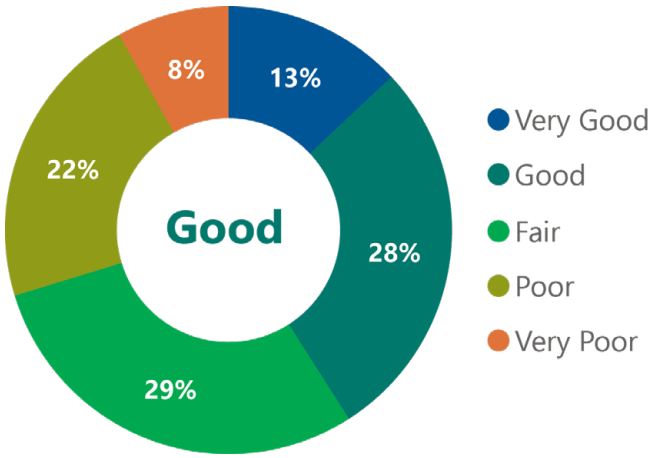
Average Condition



Average Age and Remaining Service Life



Asset Condition



Asset Condition by Asset Class and Percentage of Replacement Value

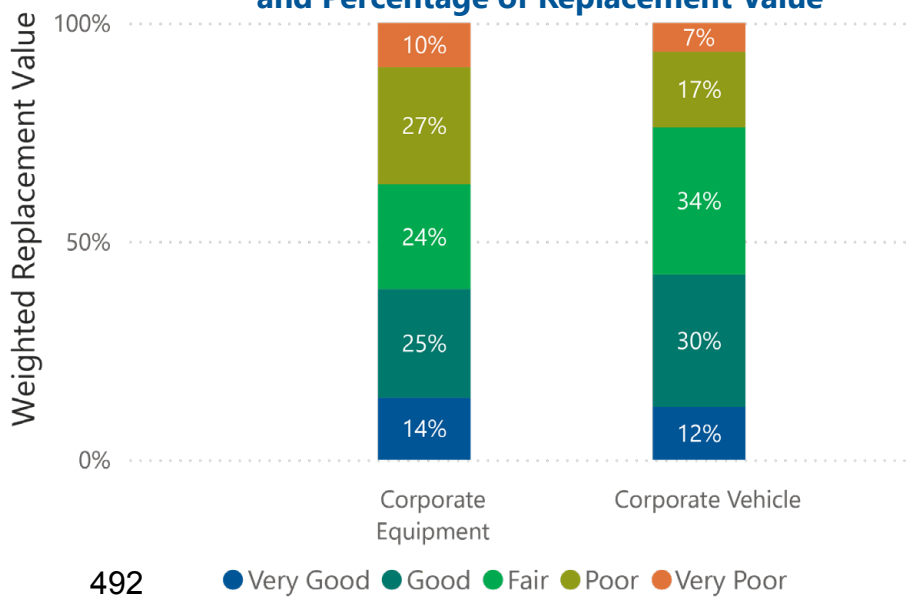


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Corporate Fleet

City-owned fleet vehicles and equipment are operated across four different service areas within the corporation: Fire, Transit, Parking, and Corporate Fleet. This section of the AMP summarizes the vehicles and equipment within the Corporate Fleet service, which are managed by Roads, Parks and Forestry (RPF). This service contributes to the City's Strategic Plan, 3.2 Environmental and Energy Leadership, and 4.1 Good Governance.

1.0 State of Local Infrastructure

An efficient, dependable and safe fleet inventory is required for service delivery to both other City departments, and to members of the community. The City's Corporate Fleet portfolio is valued at nearly $52 million.

The Corporate Fleet assets include light, medium and heavy vehicles that perform a variety of services from earth moving to snow plowing. Corporate Fleet equipment types include on- and off-road light, medium and heavy equipment, ranging from chainsaws to trailers to Zambonis.

The total replacement value for the Corporate Fleet assets is $51.9 million, the average age is 7 years, the average service life is 17 years, and the average OSI condition is Good.

See **Table 1** for the asset inventory and valuation for each asset class as well as average age, average service and average OSI condition.

Table 1: Asset Inventory and Valuation – Corporate Fleet

Asset Class	Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Corporate Vehicle	Heavy Vehicle	31	$16.8 M	6	16	Good
Corporate Vehicle	Light Vehicle	124	$7.8 M	6	14	Good
Corporate Vehicle	Medium Vehicle	31	$4.3 M	7	16	Fair
Corporate Equipment	Heavy Equipment	8	$1.4 M	8	22	Good

Asset Class	Asset Type	Quantity	Replacement Value ($2024)	Average Age (years)	Average Service Life (years)	Average OSI Condition
Corporate Equipment	Heavy Equipment (Off Road)	6	$2.4 M	13	22	Fair
Corporate Equipment	Light Equipment	346	$1.6 M	1	12	Very Good
Corporate Equipment	Light Equipment (Off Road)	394	$6.6 M	9	17	Fair
Corporate Equipment	Medium Equipment	23	$1.5 M	10	30	Good
Corporate Equipment	Medium Equipment (Off Road)	64	$9.6 M	7	16	Good

These replacement values were developed using historical acquisition costs, inflation, and estimated costs. The relatively short life of fleet assets and the availability of off-the-shelf vehicles and prices give increased confidence in the validity of the valuation. For more complex equipment and vehicles (requiring a degree of customization or the addition of equipment to a base vehicle), additional time is required to assess replacement values at the anticipated time of purchase.

The Corporate Fleet asset data inventories are maintained in a work order management system for tracking vehicles and equipment, issuing/managing work orders, preventative maintenance and inspection programs, parts inventory, purchasing, fueling and other associated costs. Regular updates to the inventory are completed after regularly scheduled maintenance activities, renewal, and replacement of fleet assets.

For Corporate Fleet assets, the OSI condition scores were age-determined by calculating the percentage of life remaining based on the age and estimated service life of the asset.

2.0 Levels of Service

The City's inventory of Corporate Fleet assets includes 186 Corporate Vehicles and 841 Corporate Equipment.

The City has selected three standardized corporate Levels of Service (LOS) metrics to report the current LOS across all 11 service areas. See **Table 2** for the current LOS (2024) for Corporate Fleet assets.

Table 2: Standardized Corporate LOS Metrics – Corporate Fleet

Technical or Community LOS	Standardized Corporate LOS	Current Performance (2024)
Technical LOS	Reinvestment Rate (%)	7.11%
Technical LOS	SOGR Backlog	$1,593,000
Corporate LOS	% Poor or Very Poor	29.72%

The City has identified Community Levels of Service (LOS), and Technical Levels of Services, which are presented in **Table 3** and **Table 4.**

Table 3: Community Levels of Service – Corporate Fleet

Service Attribute	Performance Metric	Current Performance (2024)
Scope	Number of heavy vehicles	31
Scope	Number of light vehicles	124
Scope	Number of medium vehicles	31

Table 4: Technical Levels of Service – Corporate Fleet

Service Attribute	Performance Metric	Current Performance (2024)
Quality	Fleet Utilization Rate (Percentage of Target Use versus Actual Use)	92%
Quality	Percentage of fleet assets that are nearing the end of useful life (>90% consumption of useful life)	27%
Quality	Percentage of MTO maintenance inspection completed	100%
Quality	Percentage of Safety Inspections completed and passed	100%
Reliability	Percentage of fleet in Poor or Very Poor condition	8.12%
Environmental Sustainability	Annual GHG emissions for light fleet assets (tonnes per year)	406 tCO_{2e}/year
Environmental Sustainability	Annual GHG emissions for medium fleet assets (tonnes per year)	1022 tCO_{2e}/year
Environmental Sustainability	Annual GHG emissions for heavy fleet assets (tonnes per year)	5643 tCO_{2e}/year
Environmental Sustainability	Percentage of fleet transitioned to non-fossil fuel	13.40%

3.0 Asset Management Strategy

Table 5: Lifecycle Activities – Corporate Fleet

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Maintenance Activities Including regularly scheduled inspection and maintenance or more significant repair and activities associated with unexpected events	Carrying out regular maintenance activities on all vehicles and equipment as per manufacturer's recommendations for optimum performance and lifecycle Reactive maintenance for circumstances not easily mitigated (i.e. vehicle accidents, faster than anticipated breakdown) Tracking maintenance activities in order to continue to improve. Target is to minimize unplanned, non-standardized work. Empowering certified staff to make decisions on elective repairs (under $1,000) to ensure continuity of service and fewer breakdowns while in service	Delayed maintenance activities may result in unscheduled downtime due to repair or failure.
Renewal / Rehabilitation Significant repairs designed to extend the life of the asset	Regular preventative maintenance programs assist in determining renewals/rehabilitation required	Delayed renewals or rehabilitation may result in unscheduled downtime due to repairs or failure.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
	Major overhauls or reconditioning are very costly and generally do not add enough extended life to add value Review opportunities to repurpose add-on equipment, attachments and outfitting past the lifecycle of the parent asset	
Replacement Activities Activities that are expected to occur once an asset has reached the end of its estimated service life and renewal/ rehab is no longer an option.	Optimal asset lifecycle assessed to determine the timing of replacement that minimizes maintenance/repair and maximizes salvage value. Communication with the Supervisor of Fleet Services of end-of-life assets to help with service and repair decisions to mitigate non-value-added expenditures	Delayed replacement may result in unscheduled downtime due to failure. Reduction in services may result due to failure.
Non-Infrastructure Actions or policies that can lower costs or extend service lives	Lifecycle Management Review – Condition Assessment at the end of life Review and benchmarking of lifecycles Test extending lifecycle to review impact Cost review on assets past lifecycle	Asset renewal needs are under- or overestimated.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
Expansion Activities Planned activities to improve an asset's capacity, quality and system reliability	Growth and expansion are guided by, but not limited to: Burlington's Strategic Plan 2015-2040 2018-2022 Burlington's Plan: From Vision to Focus Burlington's Integrated Mobility Plan Development Charges Background Study Green Fleet Strategy Provincial Audit & Accountability Review Capital growth projects are identified by City of Burlington Development Charges Background Study (subject to Development Charges Act, 1997 requirements) Electrification of fleet vehicles	Growth activities may be delayed and impact the quality of asset services provided. Accelerated deterioration of other assets may result if growth needs are not assessed.
Disposal Activities Activities associated with disposing of an asset once it has reached the end of its estimated	Optimal lifecycle analysis completed for each asset prior to replacement. Salvage amount can vary, but an average of 15% of replacement value is consistently achieved.	Improper disposal can lead to environmental damages or lost recovery from salvage.

Activity Type	Lifecycle Management Activities	Risks Associated with Not Completing the Activities
service life or is otherwise no longer needed by the municipality	Planning with the auction to ensure staggering of similar assets to maximize return and not flood the market with availability Planning with auction to target seasonal disposal of assets when demand is high	
Service Improvement Activities Activities to improve an asset's capacity, quality and system reliability	Post-delivery inspection to confirm that the vehicle arrived as specified End-user training specific to the equipment to ensure proper operations and operator maintenance (cleaning, greasing, etc.) Consider extended warranties when available and service agreements (i.e. rustproofing) Procurement practices to emphasize quality assets	

4.0 Risk

4.1 Internal Risk

As discussed in Section 5, Risk is quantified in this AMP by multiplying the likelihood of an asset's failure by the consequence of an asset's failure. Risk scores can be sorted from highest risk to lowest risk or can be reported as a percentage of the asset portfolio.

Risk Score = Likelihood of Failure X Consequence of Failure

The **likelihood of failure factor** is derived from the condition/age of the asset.

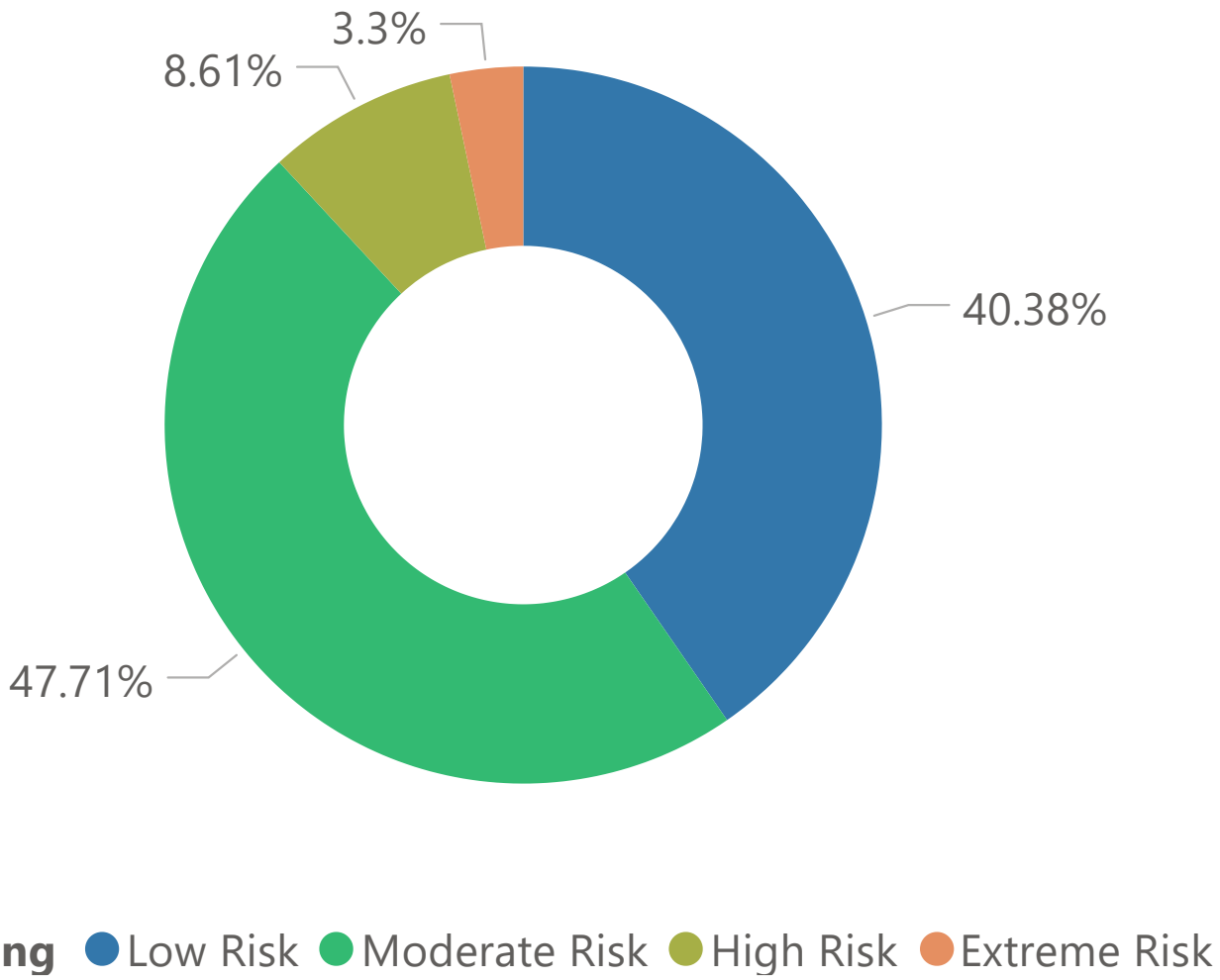
The triple bottom line **consequence of failure factors** are presented in **Table 6** for social, financial and environmental consequences.

Table 6: Consequence of Failure Factors – Corporate Fleet

Social	Financial	Environmental
• Asset Criticality	• Replacement Value	• Fuel Type

The overall risk profile, shown in Figure 1 below, is Moderate for Corporate Fleet assets, with 47.71% of assets assigned a Moderate risk rating.

Figure 1: Risk Rating by Replacement Value – Corporate Fleet



4.2 External Risk

The following external risks have been identified for the Corporate Fleet service area:

- Reduced fleet service life or increased maintenance requirements due to extended or prolonged use during weather-related events; and
- Inflation, tariffs and supply-chain issues.

Recommendation Report Summary

SUBJECT: Burlington Agricultural Action Plan
TO: Committee of the Whole
FROM: Development and Growth Management
Community Planning
Report Number: DGM-47-25
Wards Affected: All
Date to Committee: July 7, 2025
Date to Council: July 15, 2025

Recommendation

Approve the proposed Burlington Agricultural Action Plan, as provided in Appendix A of development and growth management report DGM-47-25; and

Direct the City Clerk to consider the request of the Burlington Agricultural and Rural Affairs Advisory Committee to include a representative from Burlington Economic Development & Tourism as part of the committee's composition, during the forthcoming terms of reference review for all city advisory committees.

Executive Summary

- The purpose of this report is:
  - to provide an overview of the proposed "Burlington Agricultural Action Plan" (attached as "Appendix A" to this report), including its purpose, objectives and implementation;
  - to recommend approval of the Agricultural Action Plan to support Burlington's rural economy and align with Vision to Focus 2022–2026; and
  - to recommend that the City Clerk consider changing the composition of the Burlington Agricultural and Rural Affairs Committee to include a representative from Burlington Economic Development and Tourism.
- Recent provincial changes have shifted agricultural planning responsibilities from Halton Region to the City, resulting in a greater onus on local municipalities to support the health and prosperity of the Agricultural System.

- The proposed Burlington Agricultural Action Plan (the “Plan”) presents a focused strategy to support and grow the City’s agricultural sector, while aligning with provincial policies.
- The Plan aligns with the community vision set out in the Burlington Official Plan, 2020, which emphasizes the need to conserve the character of the Rural Area and protect/enhance the natural environment while enabling the rural economy to evolve and change.
- The Plan builds on the former Halton Rural Agricultural Strategy, tailored to Burlington’s needs, and emphasizes collaboration, policy alignment, streamlined development processes, economic development, infrastructure support, and public awareness.
- The Plan is intended to function as a living document, to be reviewed and refined at the outset of each Term of Council to align with the Vision to Focus planning cycle.
- Metrics and monitoring will be established through a “State of Agriculture Report”, to be updated with each Census of Agriculture.
- Implementation details and resourcing will be confirmed through the larger ongoing process related to the transition of Regional planning responsibilities.

Overview of Proposed Agricultural Action Plan

The agricultural sector faces regulatory complexity, rural/urban land use conflicts, rising land costs, succession planning challenges and infrastructure gaps. The proposed Burlington Agricultural Action Plan outlines a comprehensive local strategy to strengthen and sustain the city's agricultural sector while aligning with updated provincial policies. The Plan is based on actions contained within the former Halton Rural Agricultural Strategy, which have been scoped, refined and prioritized to align with the Burlington context. The Plan emphasizes:

- collaboration;
- policy alignment;
- streamlined development processes;
- economic development;
- infrastructure support; and
- public awareness.

The Plan is intended to function as a living document which will be reviewed at the outset of each new Term of Council and Vision to Focus update. At this time, the actions and sub-actions within the Plan are intended to establish a set of key priorities to guide future work. As the City settles into its expanded planning responsibilities for Rural and Agricultural Systems post Regional transition, more detailed work plans will be developed to implement the actions, including timing and resourcing.

With respect to monitoring, a core action of the proposed Agricultural Action Plan is to prepare a "State of Agriculture Report" which examines key data from the Census, and other sources, to establish a baseline for Burlington. As the current Census cycle aligns with the municipal election cycle, the State of Agriculture Report would be updated every four years to support ongoing monitoring, and to inform refinements to the Plan where needed.

The City's jurisdiction is clearly defined through, and limited by, legislation and resources. Therefore, the proposed Plan focuses on actions that will specifically address local municipal concerns and not duplicate or infringe on actions more effectively dealt with by another agency or level of government. The Plan is designed to target actions, avoid duplication and focus in areas where the City can be effective in advancing its larger strategic objectives.

Background

Transition of Regional Planning Responsibilities

While the initial work to develop the City's Agricultural Action Plan was underway, the province implemented significant changes to Ontario's land use planning framework, including the removal of upper-tier planning responsibilities across several municipalities through Bill 185. In Halton Region, this change took effect on July 1, 2024 and the Regional Official Plan became an Official Plan of each of the four lower-tier municipalities. However, the Region also provides/provided several other programs and services to support the implementation of the Regional Official Plan, which were not part of its previous core responsibilities under the Planning Act.

Recognizing the impacts of the change to the Region's role in land use planning, the delivery of these programs and services was assessed by Regional staff. Recommendations resulting from this assessment were provided to Regional Council through report CA-22-24 Updates on Service Delivery Post-Bill 23. Changes included sunsetting the Halton Agricultural Advisory Committee as of July 2024, the discontinuation of Regional agricultural support services (including the role of Agricultural Liaison Officer, the Rural Agricultural Strategy and funding for the Halton Region Federation of Agriculture) as of January 1, 2025, and the discontinuation of economic development services, except for the Halton Small Business Centre, as of January 1, 2025.

Also included in the discontinuation of Regional agricultural support services is the Region's membership with the Golden Horseshoe Food and Farming Alliance (GHFFA). For context, the GHFFA is a partnership between the regional municipalities and Federations of Agriculture in Niagara, Peel, Halton, York, and Durham, and the cities of Hamilton and Toronto, Conservation Authorities, the Greenbelt Fund, Durham College and Niagara College, the Holland Marsh Growers and members of the food industry. The partnership is focused on identifying pathways for a more integrated and coordinated approach to food and farming viability in the area to ensure that the Golden Horseshoe retains, enhances and expands its role as a leading food and farming cluster.

The GHFFA is currently structured based on upper-tier municipalities representing the interests of their corresponding lower-tier municipalities, with each partner contributing an annual membership fee to support the activities of the Alliance ($35,000 for Halton Region). This includes the maintenance of the ConnectON agri-food asset mapping, preparation of research/position papers, commenting on provincial policy proposals, and various initiatives to promote local food. For example, in recent years the City of Burlington has had the opportunity to engage in the development of two very timely position papers- one on Event Barns in Ontario and one on Urban Agriculture. These papers contain valuable insight from across Ontario which Burlington can leverage to inform its own policies and programs.

By pooling resources and prioritizing initiatives based on shared needs, GHFFA members benefit from expanded access to niche subject matter expertise while avoiding duplicative

efforts. Due to the loss of regional-level agricultural support services, access to multi-jurisdictional peer to peer networks and think tanks such as the GHFFA are more critical than ever to support long term agricultural viability in Ontario. This is especially relevant within the Greater Toronto and Hamilton Area, where heavily populated urban areas may have conflicting and/or competing needs in relation to rural areas.

When report CA-22-24 was brought forward, both the Halton Region Federation of Agriculture and the Golden Horseshoe Food and Farming Alliance delegated to express their concerns to Council. In response, Regional Council passed a motion to continue its membership in the GHFFA until the end of the current term of Council in 2026, to allow more time for the transition of agricultural support services to local municipalities. Through report CA-22-24, the Region also committed to:

- identify opportunities to continue supporting agriculture and rural communities where appropriate and in the context of the delivery of other Regional services; and
- work with the Local Municipalities to provide support, including through a transition plan if required, as they identify their approaches to delivering programs and services appropriate for their community.

On this basis, the proposed Agricultural Action Plan includes a proactive action to pursue membership with the GHFFA. However, as the GHFFA is currently comprised of upper and single-tier municipalities, the organization would need to develop a new fee structure for lower-tier municipalities seeking individual membership. Given the time sensitivity, Burlington planning staff have initiated these conversations through the Halton Area Planning Partnership (HAPP) and the GHFFA and will report back to Council on potential options/feasibility as more information becomes available.

Burlington Response to Transition of Regional Planning Responsibilities

On March 18, 2025, report DGM-09-25 Transition of planning responsibilities from Halton Region was brought to City Council to provide information on the City's ongoing efforts and next steps to implement Bill 185. The report provided information about the transition of the Region's planning responsibilities associated with various aspects of the Regional Official Plan. The report also provided an overview of the outcome of Halton Region's service delivery review and noted the discontinuation of Regional agricultural support services.

In response to the issues raised within report DGM-09-25, the Burlington Agricultural and Rural Affairs Committee (BARAAC) submitted a written delegation and appeared before Council to speak to the committee's concerns. BARAAC communicated its appreciation of the City's efforts to increase rural and agricultural representation to date but noted heightened concerns regarding the long-term vitality of the rural area within the context of the new provincial

planning framework. The delegation identified economic development, infrastructure needs, policy integration, and public awareness and advocacy as key issues and proposed the following solutions:

> "Once approved, we urge the City to expedite and fund the implementation of the Burlington Agricultural Action Plan based on the following priorities:
>
> **1.** Review the BARAAC Terms of Reference to ensure it aligns with the City's added responsibilities post-Bill 23. Update the committee's composition to include a representative from Burlington Economic Development.
>
> **2.** Create a dedicated role, as per action RT9 of the Red Tape Red Carpet initiative, akin to the former Special Business Area Coordinator, to focus on rural economic development and agricultural system management within the next two years.
>
> **3.** Collaborate with stakeholders to develop a rural infrastructure plan addressing internet connectivity, drainage, road design, and electrical servicing policies.
>
> **4.** Launch a public awareness campaign highlighting the importance of agriculture to Burlington's economy and sustainability."

To better understand the needs of the rural and agricultural community from an economic development perspective and to identify possible synergies, Burlington Economic Development and Tourism (BEDT) has committed to engaging in focused discussions with the committee. It is further recommended that this request be formally considered by the City Clerk during the terms of reference review for all City advisory committees, being led by Legislative Services later in 2025.

Similarly, resourcing needs for the City's expanded Agricultural and Rural Systems portfolio are being reviewed through a comprehensive process which involves an assessment of all changes arising from the transition of Regional planning responsibilities to the local level. The Agricultural Action Plan will help to inform this process by establishing a set of key priorities for supporting long term agricultural resiliency in Burlington. As a result, Priorities 1 and 2 of the BARAAC delegation are not addressed within the proposed Agricultural Action Plan, while Priorities 3 and 4 are linked to specific actions within the Plan.

Analysis

As established in the Burlington Official Plan, 2020 (BOP, 2020), the protection and strengthening of the rural community is the City's overarching goal in planning for the rural area. This means conserving the area's rural character and protecting and enhancing its natural environment while enabling the rural economy to evolve and change. The health and prosperity of the Agricultural System is recognized as integral to these efforts.

In addition to supplying food, fuel and fibre, diversified farms also provide opportunities for agri-tourism. This enables residents and visitors to enjoy and learn about agriculture, while supporting the local economy. The stewardship activities of farmers also provide important environmental benefits, such as the protection of natural heritage and water resources.

The City's policies are designed to help the Agricultural System grow and prosper, while adapting to changing conditions. This includes direction to consider the development of a Community Improvement Plan, support the implementation of the Region's Rural Agricultural Strategy, and consider the development of an urban agricultural strategy. The proposed Burlington Agricultural Action Plan was developed in response to these directions, as well as several other relevant initiatives (refer to "Appendix B" to this report for details):

- Red Tape Red Carpet Initiative
- Burlington Brownfield Focus Community Improvement Plan
- Rural Ontario Municipal Association Conference
- Climate Resilient Burlington Plan
- Vision to Focus 2022-2026

The proposed Agricultural Action Plan would support the implementation of several related strategic goals and objectives under these initiatives, while also setting in place a consistent framework to measure and assess progress across related City service delivery areas. Further, given the province-wide nature of the Agricultural System, there are a variety of existing plans and strategies in place which would complement the City's efforts (refer to "Appendix B" to this report for details):

- The future of rural Canada: A report for the Federation of Canadian Municipalities
- Grow Ontario: a provincial agri-food strategy
- New Horizons: Ontario's Agricultural Soil Health and Conservation Strategy
- Enabling Opportunity: Ontario's Rural Economic Development Strategy
- Golden Horseshoe Food & Farming Alliance Action Plan 2021 – 2026: A Vibrant Future
- Halton Region Rural Agricultural Strategy

Through discussions with BARAAC, it was determined that the ideal approach would be to tap into and align with existing initiatives. In particular, the Halton Region Rural Agricultural Strategy was identified as a core focus, given the document's direct relevancy to the City of Burlington. Further, this document was developed by the Region of Halton to be consistent with, build on and complement the original Golden Horseshoe Food and Farming Alliance (GHFFA) Action Plan. Staff therefore worked with BARAAC to compile a scoped set of actions adapted from the former Halton Rural Agricultural Strategy, followed by a prioritization exercise, which ultimately formed the basis of the proposed Agricultural Action Plan.

Community Engagement and Communications

As an advisory committee of Council, BARAAC played a critical role in the development of the proposed Agricultural Action Plan. As outlined in its Terms of Reference, BARAAC's mandate is to advise and assist in the implementation of Burlington's agricultural and rural goals, objectives and policies. The committee does this by soliciting and coordinating the interests and concerns of Burlington's agricultural industry and rural community and communicating those interests and concerns to Council, and by responding to requests for advice from Council and City staff. The committee's mandate also includes raising community awareness and understanding of agricultural and rural issues as they relate to the City and its activities.

As detailed in this report, BARAAC has been directly engaged in various strategic initiatives over the past several years. While the need to develop an action plan for agriculture was established through the Council adoption of the new Official Plan in 2018, the specific needs of the agricultural sector have been further defined through City-led projects on red tape reduction, climate resilience, economic development and long-term strategic planning. Each of these initiatives also included extensive consultation with the general public. In addition, BARAAC has led its own efforts to engage with the broader community on agricultural priorities through participation in the Burlington Rural Form and the Food for Feedback Community Engagement BBQ in both 2023 and 2024.

Recommendation Details

BARAAC noted that the agricultural community is facing increasing challenges, many of which require immediate attention and long-term integrated planning. The proposed Agricultural Action Plan, attached as "Appendix A" to this report, will position the City to transform these concerns into opportunities for economic growth, innovation and resiliency, supported by evidence-based decision-making. As stated by the committee, agriculture is a cornerstone of Burlington's identity and sustainability goals. By investing in this sector, the City will not only protect farmland but also foster a thriving rural economy, strengthen food security, and enhance climate resiliency.

Key Dates & Milestones

- **Q4 2023- Q2 2024:** background research and public engagement
- **Q3 2024:** Transition of Regional planning responsibilities to local municipalities/Halton Region Service Delivery Review
- **Q1 2025:** Discontinuation of Halton Region agricultural sector support services

- **Q1 2025:** Update on transition of Regional planning responsibilities/BARAAC delegation to Council
- **Q2 2025:** Agricultural Action Plan finalization
- **Q3 2025:** Proposed Agricultural Action Plan brought to Council for approval

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Implications

- The City's jurisdiction is clearly defined through, and limited by, legislation and resources. Burlington's plan must focus on actions that will specifically address local municipal concerns and not duplicate or infringe on actions more effectively dealt with by another agency or level of government. The plan is designed to target actions, avoid duplication and focus in areas where the City can be effective.
- Some components of the proposed Agricultural Action Plan will be undertaken as part of existing work plans within the Community Planning department (e.g. rural and agricultural policy review). Potential resource implications for actions which are not already captured within an existing work plan will be determined through future work planning processes.
- As noted in this report, many agencies across multiple levels of government are working to support and promote rural and agricultural economic development. Where critical actions can be more appropriately addressed by working with others, partnerships will be established. Potential collaborators include the Halton Region Federation of Agriculture, Halton Public Health, Conservation Halton, the Golden Horseshoe Food and Farming Alliance, the Greenbelt Foundation, the Niagara Escarpment Commission, the Ontario Ministry of Agriculture, Food and Agribusiness (OMAFA) and other municipalities within Halton Region.
- With the City now responsible for the Region's Agricultural and Rural Systems portfolio, related staff portfolios from across the corporation are being examined to assist with matters such as rural servicing, environmental issues, aggregate extraction, rural economic development, and agricultural liaison and advisor support roles. Currently, Community Planning policy staff oversee the City's Agricultural and Rural portfolio. However, with only a portion of one full-time employee (FTE) dedicated to this area, sufficient resources are not in place to accommodate the full range of new responsibilities.
- In the near-term, the City and Economic Development will need to work together to support the City through early implementation of its new planning responsibilities and the Agricultural Action Plan. In the longer term it is expected that new responsibilities related to Agricultural and Rural Systems will require policy changes and organizational

structure changes in concert with approaches related to Water Resources, Natural Heritage and Aggregate Resources.

- As set out in report DGM-09-25, staff will report back at future committee cycles (with the first update being targeted for Q3 of 2025) with a strategy and workplan for resourcing needs to implement what were previously the responsibilities of Halton Region. This will include an analysis of cost recovery through development application fees as well as the potential for a phased roll out that aligns business cases with future budget cycles. The Agricultural Action Plan will help to inform this process by establishing a set of key priorities for supporting long term agricultural resiliency in Burlington.

References

- Burlington Agricultural and Rural Affairs Advisory Committee Terms of Reference
- MO-10-19 - Red Tape Red Carpet Task Force recommendations
- Burlington Official Plan, 2020
- ECDEV-03-21 - Red Tape Red Carpet (RTRC) Update Q1 2021
    - ECDEV-03-21 - Appendix A - RTRC Implementation Plan Dashboard Q1 2021
- Burlington Official Plan, 2020
- Burlington Brownfield Focus Community Improvement Plan 2021
- Highlights from Rural Ontario Municipal Association (ROMA) virtual conference 2022
    - Delegation Presentation 1
    - Delegation Presentation 2
- CS-06-22 Risk to Strategy – Vision 2040 final
    - CS-06-22 Appendix A - A City That Grows
- Climate Resilient Burlington Plan 2022 – 2032
    - Climate Change Vulnerability & Risk Assessment
- Vision to Focus 2022-2026
- CA-22-24 Updates on Service Delivery Post-Bill 23
    - Halton Region Federation of Agriculture Delegation
    - Golden Horseshoe Food and Farming Alliance Delegation
- DGM-09-25 Transition of planning responsibilities from Halton Region
    - March 18, 2025 BARAAC delegation re: DGM-09-25 Transition of planning responsibilities from Halton Region

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Strategic Alignment

- ☑ Designing and delivering complete communities
- ☑ Providing the best services and experiences
- ☑ Protecting and improving the natural environment and taking action on climate change
- ☑ Driving organizational performance

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Appendices:

A. Proposed “Burlington Agricultural Action Plan”
B. Additional Background Information

Notifications:

N/A

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Burlington Agricultural Action Plan

Executive Summary

The Burlington Agricultural Action Plan sets out ten core actions that the City can take to advance opportunities for economic growth, innovation and resiliency in the Rural Area. The actions are structured in a manner that aligns with the City's commitment to conserving the character of the Rural Area and protecting and enhancing its natural environment, while also enabling the rural economy to evolve and change. By investing in this sector, the City will not only protect farmland but also foster a thriving rural economy, strengthen food security, and enhance climate resiliency.

The agricultural sector faces regulatory complexity, rural/urban land use conflicts, rising land costs, succession planning challenges and infrastructure gaps. The Burlington Agricultural Action Plan (the Plan) outlines a comprehensive strategy to strengthen and sustain the city's agricultural sector while aligning with updated provincial policies. The Plan emphasizes collaboration, streamlined development processes, economic development, infrastructure support, and public awareness through the following core actions:

1. Review the rural and agriculture-related policies of the Official Plan to ensure alignment with the updated provincial policy framework.
2. Develop a targeted economic development strategy to foster businesses needed to support a healthy agricultural system.
3. Work with regulatory agencies to establish an expedited approval process for rural development.
4. Develop an awareness program that informs the public about the benefits of local agriculture.
5. With input from the rural community, develop and implement an infrastructure plan required to support the agricultural system.
6. Assess leading agricultural and related sectors to quantify what they require to thrive and how the City can assist.
7. Establish a system to track key components of the agricultural and rural system.
8. Encourage the implementation of progressive financial opportunities that support agriculture.
9. Secure the long-term productive use of agricultural lands.

10. Coordinate policies for the natural heritage system and agricultural system to ensure they are mutually supportive and enhance climate resiliency.

The Plan is intended to function as a living document which will be reviewed at the outset of each new Term of Council and Vision to Focus update. At this time, the actions and sub-actions within the Plan are intended to establish a set of key priorities to guide future work. As the City settles into its expanded planning responsibilities for Rural and Agricultural Systems post Regional transition, more detailed work plans will be developed to implement the actions, including timing and resourcing.

Background

The City of Burlington is considered an "urban" municipality, given its overall population of approximately 186,948 people, and is often recognized by its beautiful downtown and waterfront. However, approximately 50% of Burlington's geography is considered rural, with the majority being permanently protected as part of the Greenbelt (which includes the Niagara Escarpment).

Much of Burlington's Rural Area has been designated as a Prime Agricultural Area and is home to a wide variety of farming operations. As of the 2021 Census of Agriculture, Burlington had 73 operating census farms[i] which generated a total of approximately $46,388,046 in Gross Farm Receipts[ii]. Table 1 below provides a breakdown of the 73 farms by industry type, while Table 2 provides breakdown by size (both have been sorted by order of prevalence).

Table 1: Farm Industry Type

Industry Type	Number of Farms
Other crop farming	20
Other animal production	19
Oilseed and grain farming	11
Greenhouse, nursery and floriculture	8
Vegetable and melon farming	6
Fruit and tree nut farming	3
Beef cattle ranching and farming	2
Sheep and goat farming	2
Poultry and egg production	2

Table 2: Farm Acreage

Acreage Range	Number of Farms
10 to 69 acres	29

Under 10 acres	16
70 to 129 acres	13
130 to 179 acres	6
180 to 239 acres	3
240 to 399 acres	2
560 to 759 acres	2
400 to 559 acres	1
2,240 to 2,879 acres	1

Though all levels of government have implemented policies designed to preserve farmland and support the agricultural community, the sector continues to face ongoing decline. Research conducted by Halton Region during the development of its former Rural Agricultural Strategy in 2016 indicates that, although there continues to be an established agricultural sector in Halton and there is evidence of an evolving production profile focused on high value, lower acreage operations (nursery, greenhouse, mushroom, fruit, equine), there are significant issues contributing to uncertainty about the future of farming in Halton. Key concerns identified by the Region include:

- a complex, multi layered, regulatory regime;
- negative impacts related to urban development including conflicts between agricultural and non-agricultural land uses, lack of rural based infrastructure, traffic congestion, and urban service standards in rural areas;
- rising land prices due to urban proximity and high operating costs which discourage new agricultural operations and complicate inter-generational transfers;
- limited access to rental land complicated by uncertainty related to short term or non-existent leases, as well as increasing controls on how land can be used;
- continuous decline in the amount of land under agricultural production and a drop in the value of gross farm receipts;
- decline in the livestock sector, particularly in proximity to non-farm development;
- an aging farm population and reduced opportunity for cooperation amongst farmers due to declining numbers;
- lack of agricultural support services and deteriorating on-farm infrastructure;
- shortage of knowledgeable, experienced agricultural workers;
- increased restrictions on farming related to the management of the natural heritage system;

- public perception of rural land as recreational land;
- uncertainty regarding the future of the prime agricultural area that lies outside of the Greenbelt and current urban boundaries; and
- rising stress related to the challenge of farming in an urbanizing area.

Since the development of the Halton Rural Agricultural Strategy, new data has become available through the 2021 Census of Agriculture (see Appendix A to this Plan). While there has been an increase in the value of Gross Farm Receipts and the number of farms, many of the trends identified in 2016 remain.

Burlington's Rural Area in particular faces a unique policy paradox: it is home to 73 operating farms and subject to the full suite of provincial land use controls designed to protect rural and agricultural lands. Yet Burlington is ineligible for key provincial funding programs intended to support rural economic development due to its classification as an urban municipality. For example, the Ontario Rural Economic Development (RED) Program defines "Rural Ontario" as:

> **"…***all Statistics Canada census subdivisions (including lower-tier and single-tier municipalities) that either have a population of less than 100,000 people, or have a population density of 100 people per square kilometre or less, as identified in the most recent Statistics Canada Census of Canadian Population. Refer to the RED Program "Rural and Urban Areas" map."*

Since these criteria are applied to the City as a whole and there is no distinction among rural and urban land use designations, Burlington does not qualify even though its rural area is:

- entirely within the permanently protected Greenbelt;
- largely designated as a Prime Agricultural Area; and
- largely covered by the Niagara Escarpment Area of Development Control, which imposes more restrictive land use policies and overrides local zoning.

This mismatch between policy and eligibility creates a challenge. Burlington's rural area must comply with strict land use rules while contending with near-urban compatibility issues yet lacks access to many of the financial tools available to other rural communities to support economic resiliency. Further compounding the issue, the Niagara Escarpment Commission does not collect fees for development applications within the area of Development Control. This can limit the ability of municipalities to

recover the costs associated with development review and make it more challenging to assign dedicated staff resources to the rural and agricultural portfolio.

As a result, Burlington's rural area is left navigating a higher-regulation, lower-support environment—rural in character and constraints, but often urban in classification and funding. In response, Burlington has worked with its agricultural sector to identify a series of priority actions focused on building context-sensitive supports for the industry. The Plan is based on actions contained within the former Halton Rural Agricultural Strategy, which have been scoped, refined and prioritized to align with the Burlington context.

Vision

The Burlington Official Plan, 2020 sets out a community vision which includes the prosperity of the Rural Area. In the Official Plan, Burlington's Rural Area is envisioned as an economically and socially active area, producing agricultural products and providing rural recreational activities for the city.

The City is committed to the protection and strengthening of the rural community. This means conserving the area's rural character and protecting and enhancing its natural environment while enabling the rural economy, particularly agriculture, to evolve and change.

The health of the Agricultural System and the protection of the agricultural land base are central to the future of the Rural Area. Connections between the Urban and Rural Areas will protect and strengthen the social, economic, and environmental well-being of both the Urban Area and the Rural Area, including through the production and consumption of local food.

Actions

1. **Review the rural and agriculture-related policies of the Official Plan to ensure alignment with the updated provincial policy framework.**

   1.1. Review existing Official Plan guidelines addressing agricultural uses, agriculture-related uses and on-farm diversified uses, in consideration of forthcoming updated provincial guidance.

   1.2. Consult with the agricultural sector to confirm the appropriate elements and implementation approach for the agricultural system.

   1.3. Develop guidelines addressing edge planning and the interface and need for buffers between urban areas and the agricultural system.

   1.4. Confirm mapping boundaries which define the agricultural system, having regard for natural features and intra and inter regional connectivity.

2. **Develop a targeted economic development strategy to foster businesses needed to support a healthy agricultural system.**

   2.1. Confirm the types of businesses required to support the agricultural system.

2.2. Build on provincial and Golden Horseshoe Food and Farming Alliance asset mapping to identify gaps, target business opportunities and promote businesses that exist.

2.3. Pursue membership with the Golden Horseshoe Food and Farming Alliance.

2.4. Source and provide relevant information about programs that could assist in addressing gaps.

2.5. Evaluate the feasibility of tools such as “Business Improvement Areas” and “Community Improvement Plans” for the Rural Area.

3. Work with regulatory agencies to establish an expedited approval process for rural development.

3.1. Establish a coordinated development approval process to expedite the review of agriculture-based applications by the City, Niagara Escarpment Commission Conservation Authorities, and Halton Region (where applicable).

3.2. Develop communications materials and educational tools illustrating a streamlined development review process and identifying all technical requirements.

3.3. Build on programs such as the Environmental Farm Plan to establish a process whereby if a plan is filed, expedited environmental approvals may be available.

3.4. Develop best management guidelines to assist in planning for a successful agricultural system.

3.5. Investigate the potential of a “Development Permitting System” for use in association with the agricultural system.

4. Develop an awareness program that informs the public about the benefits of local agriculture.

4.1. Integrate agriculture into parks and conservation areas, encourage community gardens and investigate options for integrating agricultural uses into urban areas.

4.2. Working with the Halton Region Federation of Agriculture, form partnerships with other public agencies (e.g. Halton Public Health) to highlight the contribution of agriculture and rural areas to the well-being of all residents and to communicate the importance of a secure and sustainable local food supply.

4.3. Link local producers with consumers to promote agriculture.

4.4. Explore possible linkages between Foodland ON branding and promotion of agri-tourism.

5. **With input from the rural community, develop and implement an infrastructure plan required to support the agricultural system.**

   5.1. Investigate the appropriate agency to study the extension of natural gas access to rural properties.

   5.2. Investigate tools to support the installation of broadband infrastructure in rural and agricultural areas.

   5.3. Work with Halton Region to investigate a rural-based roads program addressing agriculture friendly road infrastructure.

   5.4. Work with Halton Region to review policies on the use of road salt to address agricultural needs with input from appropriate organizations (Ontario Federation of Agriculture, Halton Federation of Agriculture, Municipal Engineers Association, Landscape Ontario, Conservation Halton etc.).

   5.5. Work with Conservation Halton to establish policies to maintain existing and install new agricultural drainage infrastructure.

6. **Assess leading agricultural and related sectors to quantify what they require to thrive and how the City can assist.**

   6.1. Identify emerging opportunities for production and ensure that the regulatory framework is sufficiently flexible to allow those opportunities to be captured.

   6.2. Utilize results from provincial business retention and expansion study on equine to support the sector, where appropriate.

   6.3. Undertake a pilot program with the Ontario Ministry of Agriculture, Food and Agribusiness (and potentially other Halton municipalities) to conduct a business retention and expansion study for another key sector, supported by a subsequent sector development plan.

7. **Establish a system to track key components of the agricultural and rural system.**

   7.1. Develop and maintain a State of Agriculture report, to be updated in alignment with the Census of Agriculture cycle, to track key data such as the number of farms, amount of land under production, the commodity profile and gross farm receipts.

   7.2. Support the maintenance of the provincial and Golden Horseshoe Food and Farming Alliance Asset Mapping to ensure there is a comprehensive inventory of businesses involved in agriculture and food in Burlington.

8. **Encourage the implementation of progressive financial opportunities that support agriculture.**

8.1. Support small-scale value-added businesses by assisting with access to funding, required certification and planning approvals.

8.2. Support the agricultural community's efforts to implement a farm property assessment class based on productive value for agricultural not market assessment through MPAC.

8.3. Work with the Ontario Ministry of Agriculture, Food and Agribusiness to investigate and implement incentives to keep agricultural land in production.

8.4. Target funding to support rural businesses focused on agriculture and agri- food innovation.

8.5. Review future census data to determine if there is a need for the introduction of a "Small-Scale On-Farm Business" subclass tax rate based on MPAC eligibility requirements.

9. Secure the long-term productive use of agricultural lands.

9.1. Encourage and provide templates for secure land rental agreements.

9.2. Lead by example by allowing access to public land for agriculture and implementing long term secure leases.

10. Coordinate policies for the natural heritage system and agricultural system to ensure they are mutually supportive and enhance climate resiliency.

10.1. Investigate compensation for the provision of ecological goods and services where normal farm practices are limited to benefit the natural heritage system.

10.2. Identify and promote environmentally progressive stewardship practices that do not inhibit agricultural production, including soil restoration and enhancement.

Additional Considerations

Given the ongoing transition around planning responsibilities and economic development at the municipal level, certain actions were not put forward in this initial version of the City's plan to support agriculture. This includes the assessment of Halton's potential to develop as an innovation hub for agriculture and agri-food.

This is a substantial undertaking that would require multi-jurisdictional funding and collaboration. In the absence of a Regional role in economic development leadership, it is less clear how this study would be coordinated. However, were such an initiative to be undertaken, it would be critical for the City to participate. With respect to this action, the Region's former Rural Agricultural Strategy had identified the following sub-actions which would have relevance to the City of Burlington:

- Working with existing resources such as the Milton Innovation Hub and Country Heritage Park, investigate the feasibility of, and opportunities to establish, an incubator for food and agricultural related businesses.
- Support the development of a forum for discussions between local educational institutions, government agencies, private industry and the agricultural community to stimulate innovation and entrepreneurship that supports and is a component of the agricultural system.

Monitoring

A core action of the Agricultural Action Plan is to prepare a detailed “State of Agriculture Report” which examines key data from the Census, and other sources, to establish a baseline for Burlington. As the current Census cycle aligns with the municipal election cycle, the State of Agriculture Report will be updated every four years to support ongoing monitoring, and to inform refinements to the Plan where needed. Once the initial State of Agriculture Report has been created, it will inform the development of Plan metrics for long-term monitoring. The Plan itself is intended to function as a living/iterative document that is responsive to evolving and emerging needs. The next review will occur at the end of 2026, to initiate a four year-review cycle which aligns with each Term of Council and Vision to Focus planning cycle.

Resourcing

The City’s jurisdiction is clearly defined through, and limited by, legislation and resources. Therefore, the Agricultural Action Plan for Burlington focuses on actions that will specifically address local municipal concerns and not duplicate or infringe on actions more effectively dealt with by another agency or level of government. The plan is designed to target actions, avoid duplication and focus in areas where the City can be most effective.

At this time, the actions and sub-actions within the Plan are intended to establish a set of key priorities to guide future work. Many of the larger actions will require multi-jurisdictional partnerships and long-term coordination, meaning the City would have a supporting role versus a leadership role. As the City settles into its expanded planning responsibilities for Rural and Agricultural Systems post Regional transition, more detailed work plans will be developed to implement the actions and clarify the City’s roles and responsibilities, including timing and resourcing.

[i] **Census farm** refers to a farm, ranch or other agricultural operation that produces at least one of the following products intended for sale: crops, livestock, poultry, animal products, greenhouse or nursery products, Christmas trees, mushrooms, sod, honey or bees, and maple syrup products. Also included are feedlots, greenhouses, mushroom houses and nurseries; farms producing Christmas trees, fur, game (animals and birds), sod, maple syrup, or fruit and berries; beekeeping and poultry hatchery operations; operations with alternative livestock (bison, deer, elk, llamas, alpacas, wild boars, etc.) or alternative poultry (ostriches, emus, etc.), when the animal or derived products are intended for sale; backyard gardens if agricultural products are intended for sale; and operations involved in boarding horses, riding stables, and stables for housing or training horses, even if no agricultural products are sold. Sales in the previous 12 months are not required, but there must be the intention to sell.

[ii] **Gross farm receipt** refers to the gross farm receipts of the agricultural operation in the year prior to Census or the last complete accounting (fiscal) year. This includes receipts from all agricultural products sold, program payments and custom work receipts. It does not include sales forestry products (firewood, pulpwood, logs, fence posts, pilings, etc.), of capital items (quota, land, machinery, etc.), or receipts from the sale of any goods purchased only for retail sales. It is gross receipts before deducting expenses.

Additional Background Information

Initiatives Informing the Development of the Proposed Agricultural Action Plan:

Red Tape Red Carpet Initiative 2019

On September 23, 2019, City Council approved the 22 recommendations arising from the Mayor's Red Tape Red Carpet (RTRC) Task Force initiative to better serve customers as part of the City's commitment to continuous improvement. A draft implementation plan was presented at the October 8 Planning and Development Committee and approved by City Council on October 21, 2019. In relation to the agricultural sector, actions RT8 and RT9 or RTRC identified the need to:

> *Review the agribusiness rules, zoning, and definitions to encourage diversified use and help support economic sustainability for our rural/farming businesses.* (RT8)
>
> *Establish a rural-point-of-contact person who can navigate agriculture requests (business or otherwise) with other agencies*. (RT9)

In relation to RT8, Burlington Economic Development (BED, prior to merging with Tourism Burlington) and Community Planning staff prepared a draft guide to support agri-businesses in navigating the development approvals process. However, due to the appealed status of the expanded permissions in the BOP, 2020, the guide remained in draft and was not formally approved. In relation to RT9, a Senior Planner in Community Planning and existing staff liaison to BARAAC was named as the interim rural-point-of-contact person, with the understanding that the Task Force would consider more permanent solutions for the longer term.

The Burlington Agricultural and Rural Affairs Advisory Committee (BARAAC) was engaged to provide further input on policies and processes relating to agribusiness, as well as how the proposed rural-point-of-contact role should be scoped. Over time, these discussions evolved to a focus on developing an agricultural action plan for the City of Burlington, to better capture the full spectrum of needs expressed by the agricultural sector.

Burlington Official Plan, 2020

The Burlington Official Plan, 2020 (BOP, 2020) establishes that the economic health and long-term viability of the agricultural system plays an important role in creating a healthy and environmentally sustainable city. The policies of the Plan are directed at providing the conditions for agriculture and the agricultural system to grow and prosper and to adapt to changing conditions. In relation to this goal, section 5.5.2 of the BOP, 2020 contains the following enabling policies:

a) The City will consider providing incentives and other forms of assistance to support the development of agricultural, agriculture-related and on-farm diversified businesses through the preparation, adoption and implementation of a Community Improvement Plan under Subsection 12.1.15 of this Plan.

d) The City will collaborate with the Region of Halton in implementing Halton Region's Rural Agricultural Strategy to support the long-term sustainability and prosperity of the agricultural system and the rural economy.

e) The City will consider the development of an urban agricultural strategy to identify and support appropriate agricultural uses in the Urban Area, in accordance with the policies in Section 4.9, Community Gardens and Urban Agriculture, of this Plan.

Burlington Brownfield Focus Community Improvement Plan, 2021

In 2021, the City approved a Community Improvement Plan (CIP) with a focus on brownfield remediation. Through this process, input from key stakeholders, CIP Project Team, and the public identified a number of other community improvement need areas where one or more CIPs could be developed by the City as part of a comprehensive CIP strategy to further advance the City's key policy objectives.

These other key community improvement need areas are outlined in section 4.3 of the Plan and include a description of "Rural Economic Development" opportunities in accordance with section 5.5.2 of the BOP, 2020. This future-oriented section of the CIP notes that such incentives could:

- help agricultural operations to adapt to economic and technological change and to adopt innovative new agricultural practices (Official Plan Policy 9.2.1a) (vii)) while also boosting rural employment;
- help promote agriculture-related uses and on-farm diversified uses that are compatible with agriculture and support the development of a more diverse, innovative and economically strong agricultural industry in the city (Policies 9.2.1a) (vi) and (viii)); and
- help diversify revenue streams and better positions the agricultural industry to adapt to the impacts of a changing climate, thereby increasing the overall resiliency of the sector.

The CIP report also highlights that it is important to consider the future development of City-led programs to support Burlington's agricultural sector, given that the city may not meet eligibility requirements of some Provincial rural economic development programs. This is a result of Burlington's unique rural/urban context and the fact that "rural" municipalities are often defined by overall population, as well as the types of servicing available.

Halton Region Agricultural Working Group

Halton Region coordinated an Agricultural Working Group (AWG) from March to May 2021 as part of the Regional Official Plan Review (ROPR) consultation process. The AWG brought together representatives of the agricultural sector (including representatives of BARAAC) and regional staff with a shared interest in the vitality and success of agriculture in Halton.

The intent of the AWG was to provide a key forum for the constructive sharing of information and views about agriculture-related issues in the Region. The following recommendations (contained in a summary report prepared by the Region) were agreed upon to continue advancing with solutions-based discussion through the remainder of the ROPR process:

1. The Region will further develop the specific exemptions for agricultural uses and buildings within key features and vegetation protection zones, in consultation with all stakeholders;

2. The Region will continue working with the agricultural community on the development of updated key feature mapping to ensure that the mapping is as accurate as possible in the next iteration of the ROP;

3. The Region will continue to directly contact those that may be affected by updated mapping;

4. The Region will prepare updated ROP policies, and through the Rural and Agricultural Strategy and the Natural Heritage Strategy, to further recognize the importance of agriculture, recognize farmers as good stewards and which remove barriers to agricultural investment wherever possible;

5. The Region will explore opportunities to streamline the site plan process at the local municipal level;

6. The Region will work with the Niagara Escarpment Commission and develop an operational guide that outlines the Region's role in the processing of Development Permit applications;

7. The Region will consider developing a concierge service to provide direct assistance in navigating planning processes when applications to develop agricultural uses are submitted;

8. The Region will update its EIA guidelines to provide greater clarity on triggers, scoping and the waiving of EIA's, with these guidelines based on an updated ROP policy framework;

9. The Region will determine if there is an ability to allow for the waiving of fees related to the Regional role in the review of applications; and

> *10. The Region commits to further consultation with the agricultural community as the policies in the ROP are updated.*

Though these proposed actions have been impacted by the transition of Regional planning responsibilities to the local municipalities, they are still largely representative of issues raised by the agricultural sector and have therefore informed the development of the proposed Burlington Agricultural Action Plan.

Rural Ontario Municipal Association Conference 2022

In 2022, Mayor Meed Ward participated in delegations with representatives from two provincial ministries as part of the Rural Ontario Municipal Association (ROMA) conference:

> *Delegation 1: Deputy Minister Monique Rolf von den Baumen-Clark and ADM Craig Brown, Policy Division, Ontario Ministry of Northern Development, Mines, Natural Resources and Forestry to discuss Red Tape reduction, and a coordinated approach to approvals.*
>
> *Delegation 2: Minister Lisa Thompson of the Ministry of Agriculture, Food and Rural Affairs, joined by Oakville North Burlington MPP Effie Triantafilopoulos and Burlington MPP Jane McKenna, to discuss thinking differently and inclusively about farmers "in the City" when engaging with the agricultural sector.*

These delegations were informed by a set of advocacy priorities developed by BARAAC and resulted in a commitment by the Ministry of Northern Development, Mines, Natural Resources and Forestry (so called at the time) and the Niagara Escarpment Commission to engage in future discussions with the City of Burlington on process improvement.

Climate Resilient Burlington Plan 2022 – 2032

Climate Resilient Burlington (CRB) is a climate adaptation plan identifying actions to manage the highest projected risks of warmer, wetter and wilder weather. Stakeholders, which included BARAAC, assessed the highest climate risks for Burlington, identified actions to manage these risks, and prioritized 32 actions for implementation. This work involved the completion of a "Climate Change Vulnerability & Risk Assessment", which captured a detailed analysis of key risks to Burlington. In relation to the agricultural sector, action 5-1 of CRB identified the need to:

> "*Pursue approval to develop a Burlington Agricultural Action Plan that includes a climate lens and considers opportunities to complement partner agency initiatives*.".

Rural economic development and on-farm diversification are critical elements of building agricultural resiliency in the face of increasingly extreme and unpredictable weather conditions. Enabling farmers to grow and expand their operations in a manner that is nimble and cost-effective enhances their ability to adapt to the effects of a changing

climate. Other measures typically captured in an agricultural action plan, such as investments in rural infrastructure and on-farm stewardship, can also help to insulate farmers from the effects of extreme weather by mitigating/minimizing the impacts of flooding, erosion, drought etc.

Vision to Focus 2022-2026

In 2022, the City completed a risk assessment of its Strategic Plan – Vision 2040. This process allowed staff involved in delivering the outcomes of the City's strategic objectives to qualitatively describe what success looks like, including the associated outcomes. Under the theme "A City that Grows" in relation to the objective "Burlington's Rural areas economically and socially active", staff identified the following key risk:

> *Succession and transition issue for farms not properly addressed, creating a barrier for new farm entrants (family or other)*

To address this risk, it was recommended that the City develop an agricultural action plan and support Halton Region in implementing its Rural Agricultural Strategy (see Appendix A: Risk Confidence Chart – A City that Grows). As a result, the updated Vision to Focus now includes "Develop a Burlington Agricultural Action Plan with a climate lens" as Action I under Focus Area 3. This action complements Action 5-1 of the Climate Resilient Burlington Plan.

Examples of Complementary Initiatives Led by Other Agencies/Organizations:

Grow Ontario: a provincial agri-food strategy

- A Provincial plan to strengthen the agri-food sector, fuel economic growth, ensure an efficient, reliable, and responsive food supply and address ongoing agri-food sector vulnerabilities through new innovations.
- Outlines actions to build consumer confidence, support farmers and processors, increase yields, promote Ontario-grown food, grow the agri-food talent pool, and strengthen the food supply chain – while increasing the commercialization and adoption of innovative new technologies and practices that enhance competitiveness, add productivity, create economic growth, and strengthen the sector.

New Horizons: Ontario's Agricultural Soil Health and Conservation Strategy

- A Provincial plan to guide collaborative soil health research, investments and activities until 2030. The strategy's vision is: Healthy agricultural soils contribute to a vibrant agricultural sector, productive economy, sustainable environment and thriving society.
- Outlines actions to address Soil Management, Soil Data and Mapping, Soil Evaluation and Monitoring and Soil Knowledge and Innovation.

Enabling Opportunity: Ontario's Rural Economic Development Strategy

- A Provincial plan to ensure rural communities are best positioned to take advantage of opportunities and address challenges.
- Outlines actions to address safe and strong rural communities, business development and attraction, and growing the rural workforce.

Golden Horseshoe Food & Farming Alliance Action Plan 2021 – 2026: A Vibrant Future

- The Golden Horseshoe Food and Farming Alliance (GHFFA) is a partnership between the regional municipalities and Federations of Agriculture in Niagara, Peel, Halton, York, and Durham, and the cities of Hamilton and Toronto, Conservation Authorities, the Greenbelt Fund, Durham College and Niagara College, the Holland Marsh Growers and members of the food industry.
- Outlines pathways for a more integrated and coordinated approach to food and farming viability in the area to ensure that the Golden Horseshoe retains, enhances and expands its role as a leading food and farming cluster.

Halton Region Rural Agricultural Strategy

- A [former] Regional plan to sustain and grow a prosperous rural community and permanent agricultural system within Halton Region.
- Outlines actions to establish and sustain a Regional Agricultural system; protect the integrity of the rural area; enhance rural and agricultural prosperity; contribute to well-being and quality of life for Regional residents; and support vibrant rural communities.

Recommendation Report Summary

SUBJECT: Statutory Public Meeting and Recommendation Report for Official Plan Amendment and Zoning By-law Amendment for 35 Plains Road East

TO: Committee of the Whole

FROM: Development and Growth Management

Community Planning

Report Number: DGM-40-25

Wards Affected: 1

Date to Committee: July 8, 2025

Date to Council: July 8, 2025

Recommendation

Approve the applications, as modified by staff, for an Official Plan Amendment and a Zoning By-law Amendment submitted by KFA Architects + Planners Inc., on behalf of property owner 2816544 Ontario Inc. for the development of a 13-storey mixed use building consisting of ground floor retail and service commercial uses with 161 residential units above; and

Approve Official Plan Amendment No. 162 to the City of Burlington Official Plan 1997, as outlined in Appendix D of development and growth management report DGM-40-25, to amend the designation at the lands located at 35 Plains Road East as “Mixed Use Corridor – Commercial Corridor” with site-specific policies; and

Deem that the Official Plan Amendment No. 162 is consistent with The Planning Act; and

Instruct the City Clerk to prepare the necessary by-law adopting Official Plan Amendment No. 162 as outlined in Appendix D to development and growth management report DGM-40-25 to be presented for approval at the same time as the associated by-law to amend Zoning By-law 2020, as amended, for the development proposal; and

Approve Zoning By-law 2020.507, attached as Appendix E to development and growth management report DGM-40-25, to rezone the “MXC-470” zone to “H-MXC-565” as amended for the lands at 35 Plains Road East; and

Deem that Zoning By-law 2020.507 will conform to the Halton Region Official Plan, the 1997 Official Plan of the City of Burlington and the 2020 Official Plan once Official Plan Amendment No. 162 are adopted; and

State that the amending zoning by-law will not come into effect until Official Plan Amendment No. 162 is adopted.

Executive Summary

Purpose of report:

- The purpose of this report is to provide Council with information on the Official Plan Amendment and Zoning By-law Amendment application that is necessary for proceeding with the Statutory Public Meeting and present a recommendation on the application. The requested amendments reflect a revised proposal from the previously approved 9-storey mixed-use building with approximately 278m^2 of retail service and commercial uses on the ground floor and 72 residential units above. The currently proposed development consists of a development of 13-storey mixed use building with approximately 457m^2 of retail and service commercial uses on the ground floor and 161 residential units above which represents an increase of 89 residential units and approximately 178m^2 additional ground floor retail and service commercial space.
- Staff are recommending approval of the Official Plan and Zoning By-law Amendment applications at 35 Plains Road East (the “subject lands”) for a 13-storey mixed use building consisting of ground floor retail with 161 residential units above with modifications to the proposed Amenity Area rates per unit.

Key findings:

- The applicants have applied for an Official Plan Amendment and Zoning By-law Amendment to facilitate the proposed development. The proposed amendments to the Official Plan designation include increased height from 9 to 13 storeys as well as increased Floor Area Ratio (FAR) from the existing maximum 4.4:1 to 6.9:1. Additionally, an amendment to the Zoning By-law 2020 is required for the same as well as for increased number of units, measured height, commercial floor area, amenity area as well as reduced parking, and setbacks
- Staff are recommending approval of the proposed Official Plan Amendment and Zoning By-law Amendment based on the following:
    - The proposed amendments are consistent with the Provincial Planning Statement (2024);
    - The proposed amendments conform with the Regional Official Plan (2009, as amended) and maintain the general intent of the Burlington Official Plan (1997) and Burlington Official Plan (2020);
    - The proposed development maintains the general intent of Zoning By-law 2020;
    - Staff is of the opinion that the proposed development represents good planning.

RECOMMENDATION:		Approval with modifications	***Ward:***	1
Application Details	***APPLICANT:***		KFA Architects and Planners Inc	
	OWNERS:		2816544 Ontario Inc	
	FILE NUMBERS:		505-05/25 and 520-06/25	
	TYPE OF APPLICATION:		Official Plan & Zoning By-law Amendment	
	APPLICANT'S PROPOSAL:		13-storey mixed use building consisting of ground floor retail and service commercial uses with 161 residential units above.	
Property Details	***PROPERTY LOCATION:***		Northwest corner of Plains Road East and Cooke Boulevard.	
	MUNICIPAL ADDRESS:		35 Plains Road East	
	PROPERTY AREA:		0.20 ha	
	EXISTING USE:		Vacant land	
Documents	***1997 OFFICIAL PLAN Existing:***		'Mixed Use Corridor - Commercial Corridor' with site specific policies	
	1997 OFFICIAL PLAN Proposed:		'Mixed Use Corridor - Commercial Corridor' with site specific policies as amended	
	2020 OFFICIAL PLAN Existing:		'Urban Corridor'	
	2020 OFFICIAL PLAN Proposed:		'Urban Corridor'	
	ZONING Existing:		'Mixed Use Corridor Commercial' with site specific exceptions (MXC-470)	
	ZONING Proposed:		'Mixed Use Corridor Commercial' (H-MXC-565) with site specific exceptions and with a holding provision as amended	
Processing Details	***APPLICATION SUBMITTED:***		March 14, 2024	
	APPLICATION DEEMED COMPLETE:		March 14, 2024	
	STATUTORY DEADLINE:		July 12, 2025	
	PRE-APPLICATION COMMUNITY MEETING:		June 10, 2024	
	STATUTORY PUBLIC MEETING:		July 8, 2025	
	PUBLIC COMMENTS:		At the time of writing this report, 3 written public comments were received out of 157 notices.	

Background

On March 14, 2025, the City acknowledged that complete applications had been received for an Official Plan Amendment and Zoning By-law Amendment for 35 Plains Road East. The purpose of these applications is to amend the in effect Official Plan and Zoning By-law to facilitate a revised proposal primarily seeking to increase:

- Height - increase of 3 storeys from the previously approved 9-storeys to 13-storeys (inclusive of mechanical penthouse and amenity area on the 13th storey)
- Residential units - increase of 89 units from the previously approved 72 units to 161 residential units
- Retail/Service Commercial space – proposed increase of 178m^2 from 278m^2 to approximately 457m^2

An Official Plan Amendment and Zoning By-law Amendment application (File Nos.: 505-03/16 and 520-04/16) was submitted to the City of Burlington in 2016. This application amended the subject lands 'Mixed Use Corridor – Commercial' designation with site-specific policies as well as rezoned the subject lands from "MXC-175" to "MXC-470" to permit the development of 9-storey mixed-use building with approximately 278m^2 of retail and service commercial uses on the ground floor and 72 residential units above. These were later appealed to the Local Planning Appeal Tribunal (now known as the Ontario Lands Tribunal) and approved by the same on July 12, 2018. A Site Plan application for this same development concept was later submitted in November of 2021 (File No.: 535-015/21) and received Site Plan approval on May 8, 2023 but was later withdrawn as per the applicant's request.

Description of Subject Property and Surrounding Land Uses

The subject lands are located at the northwest corner of Plains Road East and Cooke Boulevard. The subject lands have a total area of 0.20 hectares and are currently vacant. Surrounding uses are as follows:

- North: to the north is the property 1026 Cooke Boulevard which contains a 1-storey commercial building and recent development approvals for a 24-storey mixed use building containing retail and commercial uses at grade and residential uses above.

- East: to the east is Cooke Boulevard and across are the properties 53-71 Plains Road East and 1025 Cooke Boulevard which contain a 1-storey entertainment establishment as well as vacant lands and have received development approvals for two mixed use buildings of 18- and 9-storeys with retail and service commercial uses at grade and residential uses above.t

- South: to the south is Plains Road East and across are various properties with residential and commercial uses ranging between 1- and 2-storeys as well as the property 28 Plains Road East which contains a 6-storey mixed use building with retail and service commercial uses at grade and residential uses above.t

- West: to the west is 15 Plains Road East which includes a 1-storey service commercial building utilized as a Royal Bank of Canada (RBC) branch.

The subject lands are located approximately 85 metres from the nearest Burlington Transit bus stops located on the intersection of Plains Road East and Waterdown Road. The intersection includes bus stops for Route 1 (Plains) which runs along Plains Road into the City of Hamilton, and provides access to the Burlington GO and Appleby GO stations as well as bus stops for Route 4 (Central) which runs along Waterdown Road to the Aldershot GO Station, downtown and the Appleby GO Station. The proposed development is also located approximately 800m from the Aldershot GO station and higher-order transit.

Description of Applications

KFA Architects and Planners Inc has made an application on behalf of the owner 2816544 Ontario Inc to amend the Official Plan and Zoning By-law for the properties located at 35 Plains Road East. These applications propose an Amendment to the Official Plan 1997, as amended and Zoning By-law 2020 to facilitate the development of a 13-storey mixed use building consisting of ground floor retail and service commercial uses with 161 residential units above.

Analysis

Aldershot GO Major Transit Station Area

The Provincial Planning Statement (the “PPS”) directs that growth and development be focused in ‘Settlement Areas’. Settlement Areas include built-up urban areas where development is concentrated, and which have a mix of land uses and lands which have been designated in an Official Plan for development over the long term. Settlement Areas also include Strategic Growth Areas such as Major Transit Station Areas (MTSA), where growth should be mainly focused.

In accordance with Section 2.4.2. of the PPS, in order support the achievement of complete communities, a range and mix of housing options, intensification and more mixed-use development Strategic Growth Areas should be planned to:

a. to accommodate significant population and employment growth;
b. as focal areas for education, commercial, recreational, and cultural uses;
c. to accommodate and support the transit network and provide connection points for inter- and intra-regional transit; and
d. to support affordable, accessible, and equitable housing.

In accordance with Section 2.4.2 2. of the PPS, within MTSAs on higher order transit corridors, planning authorities shall plan for a minimum density target of 160 residents and jobs combined

per hectare for those that are served by light rail or bus rapid transit. The City's Integrated Mobility Plan (IMP) envisions the Plains Road as a future Bus Rapid Transit Corridor with dedicated lanes.

The Halton Region Official Plan (ROP) considers the subject lands to be within as a Strategic Growth Area as they are found within a Major Transit Station Area (MTSA) and are located along Plains Road East which is designated as Regional Intensification Corridor also known as the 'Plains-Fairview Corridor'. Section 81 and 82.3, describes that some the objectives of the MTSAs and the Regional Intensification Corridors are to provide a range and mix of transit-supportive uses, such as higher-density mixed uses such as residential, retail, office and public uses, as well as public service facilities and parks and open spaces that support the area in a pedestrian-oriented urban environment.

The subject lands are designated as 'Mixed Use Corridor - Commercial Corridor' under Official Plan (1997, as amended) (OP 1997). In accordance with Part III, Section 5.3.2 iii), lands designated Mixed Use Corridor, subject to the Commercial Corridor Policies and located within a MTSA, shall permit only transit supportive uses, have a minimum floor space index of 0.5 and a minimum building height of two storeys. Similarly, the subject lands are designated as 'Urban Corridor' and are within the 'Aldershot Major Transit Station Area (MTSA) Special Planning Area' under Official Plan (2020). In accordance with Section 2.3.1 h) of the OP 2020, MTSAs are intended to serve as city-wide destinations and focal points for the provision of higher intensity and mixed-use land uses, transit supportive development that will accommodate majority of the growth of the City's future population and employment.

At the June 18, 2024, Council meeting, Council adopted OPA 2 and approved in principle the Community Planning Permit System By-law for the City's MTSAs. The Major Transit Station Area (MTSA) Community Planning Permit System (CPPS) is identified in the City's Action Plan for the Housing Accelerator Fund to create more housing supply at an accelerated pace and to enhance certainty in the approvals process. OPA 2 proposes to replace policies and schedules from the Burlington Official Plan, 2020 to implement the findings of the MTSA Area Specific Planning Project for the Downtown Burlington UGC/Burlington GO MTSA, Aldershot GO MTSA, and the Appleby GO MTSA and establish these areas as Protected Major Transit Stations in accordance with the Planning Act. Although OPA 2 still needs to be approved by the Province, the boundaries of the MTSAs, as delineated and approved through the Region's work on ROPA 48, are in effect. The subject lands are found within the 'Aldershot Main Street' Precinct in accordance with the Council adopted amendment which envisions a mid-rise built form (up to 11-storeys).

The proposed development includes residential intensification on vacant lands including 161 new residential units that would serve as additional housing options in the city, and which will be municipally serviced by nearby existing public transit routes. The subject lands are located approximately 85 metres from the nearest Burlington Transit bus stops located on the intersection of Plains Road East and Waterdown Road. The intersection includes bus stops for Route 1 (Plains) which runs along Plains Road East into the City of Hamilton and provides access to the Burlington GO and Appleby GO stations as well as bus stops for Route 4 (Central)

which runs along Waterdown Road to the Aldershot GO Station and the Appleby GO Station. The proposed development is also located approximately 800m from the Aldershot GO station and higher-order transit. As a result, staff is of the opinion that the proposed development is an efficient use of the land, resources, infrastructure and public service facilities which are planned and available. The proposed development is intended to provide mixed-use intensification that supports a pedestrian-oriented urban environment and existing as well as planned transit while ensuring the neighbourhood character is preserved. The proposed development has been reviewed against the applicable in effect Official Plan policies including the development intensification criteria and associated design guidelines as later discussed under Appendix F – Detailed Planning Analysis.

2.0 Development Built Form and Intensification Criteria

In accordance with Section 2.4.1 3. of the PPS, planning authorities should identify the appropriate type and scale of development in strategic growth areas and the transition of built form to adjacent areas as well as permit development and intensification within these to support the achievement of complete communities and a compact built form. Similarly, Section 81 of the ROP describes that some the objectives of the MTSAs, are to provide a range and mix of transit-supportive uses, to support the area in a pedestrian-oriented urban environment while considering contextually appropriate intensification opportunities to ensure the protection of neighbourhood character.

In accordance with Part III, Section 2.5.2 a) (v) and (ix) of the OP 1997, compatibility is achieved with the existing neighbourhood character in terms of scale, massing, height, siting, setbacks, coverage, parking and amenity area so that a transition between existing and proposed buildings is provided. Capability exists to provide adequate buffering and other measures to minimize any identified impacts. Similarly, Part III, Section 2.5.2 a) (x) describes that where intensification potential exists on more than one adjacent property, any re-development proposals on an individual property shall demonstrate that future re-development on adjacent properties will not be compromised.

Section 12.1.2 (2.2) c) (ii) (iv) and (viii) of the OP 2020, describes that the development shall achieve built form compatibility, achieve high quality urban design and is consistent with the policies contained in Chapter 7 – Design Excellence of the OP 2020 and provide buffering, setbacks and amenity area so that an appropriate transition between existing and proposed buildings are provided. Similarly, Section 12.1.2 (2.2) c) (ix) describes that, the development shall demonstrate that future development on the adjacent properties will not be compromised by the proposal and be designed to facilitate future pedestrian, cycling and/or private street connections.

Staff is of the opinion that the proposed building maintains compatibility with the existing neighbourhood character in terms of scale, massing, height, siting, setbacks, coverage as discussed in the analysis provided under Appendix F – Detailed Planning Analysis including the review of the Zoning By-law and applicable Urban Design Guidelines. The proposed development includes an amenity area rate of approximately 10m^2 per dwelling unit which results

in a total of approximately 1657 m^2. Staff consider the proposed rate to be well below the appropriate amount of amenity to account for the additional 89 residential units being proposed in comparison to the previous development concept. The previous development for a 9-storey mixed use building with retail at grade and 72 residential units included a total of approximately 1240m^2 which reflects a rate of approximately 17m^2 per dwelling unit. Staff are therefore recommending a modification to increase in the minimum required amenity area to 15 m^2 per dwelling unit which would result in a total required amenity area of 2415m^2.

3.0 Housing

In accordance with Section 2.2, 1. of the Provincial Planning Statement (PPS, 2024), planning authorities shall provide for an appropriate range and mix of housing options and densities to meet projected needs of current and future residents of the regional market area by:

b. permitting and facilitating:

1. all housing options required to meet the social, health, economic and wellbeing requirements of current and future residents, including additional needs housing and needs arising from demographic changes and employment opportunities; and
2. all types of residential intensification, including the development and redevelopment of underutilized commercial and institutional sites (e.g., shopping malls and plazas) for residential use, development and introduction of new housing options within previously developed areas, and redevelopment, which results in a net increase in residential units in accordance with policy 2.3.1.3;

c. promoting densities for new housing which efficiently use land, resources, infrastructure and public service facilities, and support the use of active transportation; and

d. requiring transit-supportive development and prioritizing intensification, including potential air rights development, in proximity to transit, including corridors and stations.

Section 75 of the ROP projects that for the City of Burlington, a population target of 240,050 people as well as a density target of 20,500 Housing Units by 2041. Furthermore, in accordance with Section 86, (6) of the ROP, the per cent of new housing units produced annually in Halton in the form of townhouses or multi-storey buildings is to be at least 65 per cent to 2031 and at least 75 per cent each year thereafter.

In accordance with Section 84, the goal for housing is to supply the people of Halton with an adequate mix and variety of housing to satisfy differing physical, social and economic needs and some of the objectives include: to make more efficient use of existing developed lands, housing stock and available services to increase the supply of housing while maintaining the physical character of existing neighbourhoods and encourage the Local Municipalities and the building and development industry to develop innovative housing designs that stress flexibility in use, mix of compatible land uses, good environmental practices, universal physical access, public safety and security needs, cost-efficiency, affordability and energy and natural resource conservation while maintaining sound engineering and planning principles

Section 3.1.1(2)(g) of the City of Burlington Official Plan (2020) and the City's Strategic Plan, directed the City to develop a city-wide housing strategy to, among other things, support the

Region of Halton's Housing Strategy, describe the current range and mix of housing in the City, establish city-wide housing objectives, examine opportunities for partnerships to increase the supply of affordable housing, to develop minimum targets in support of achieving the region of Halton's housing mix. The Burlington Housing Strategy and the Annual Housing Targets (Appendix B to the Housing Strategy) were approved by City Council on June 21, 2022. The City's Housing Strategy provides a roadmap for addressing local housing needs and increasing housing options that meet the needs of current and future residents at all stages of life and at all income levels. The Housing Strategy identifies 12 Actions to move toward the vision for housing in Burlington. It provides a set of action-oriented housing objectives (Themes) and an associated implementation plan.

One of the housing objectives (Theme 2) of the Housing Strategy is to Support a Broad Variety of Housing Types and Forms to increase housing options that meet the needs of all current and future residents at all stages of life. This theme describes there is an important need to diversify the existing housing stock to include additional semi-detached, townhouse, mid-rise, high rise, and alternative housing forms as the City's current housing stock is primarily composed of single-detached dwellings. Furthermore, Action 4 of the Housing Strategy established minimum targets around housing that builds upon the policies of the City of Burlington Official Plan (2020) and uses the findings of the Housing Strategy Project. These targets are appended to the Housing Strategy and establish that out of all new dwellings in the City, 1- and 2-bedroom dwellings should make up 55 per cent out of the 80 per cent of new Apartment Dwellings. The proposed development includes a breakdown of 56 per cent of 1-bedroom units, 34 per cent of 2-bedroom and 10 per cent of 3-bedroom units.

The proposed development includes amendments to the previously approved 9-storey mixed-use building with 278m^2 of retail service commercial uses on the ground floor and 72 residential units above, representing an increase of 89 residential units and approximately 178m^2 additional ground floor retail and service commercial space. Staff is of the opinion the proposed development meets the housing policies outlined under the Provincial, Regional and Local Plans.

Zoning By-law

The subject property is currently zoned 'MXC-470' ('Mixed-Use Corridor Commercial' with site-specific regulations) under Zoning By-law 2020 as amended (as shown on Appendix A – Existing Zoning Plan). The MXC permits a range of retail and service commercial uses, office, community institutions, hospitality, automotive as well as entertainment and recreation uses. This zone also permits medium and high-density residential uses.

The application requests a Zoning By-law Amendment to rezone the subject lands from 'MXC-470' ('Mixed-Use Corridor Commercial' with site-specific regulations) to 'H-MXC-565' ('Mixed-Use Corridor Commercial' with site-specific regulations and with a holding provision) as amended with new regulations in order to facilitate the development of a 13-storey mixed use building consisting of ground floor retail and service commercial uses with 161 residential units

above. City Planning staff have included a holding provision on the zoning application in order to address staff concerns related to the injury and removal of neighbouring trees, trunk sewer servicing capacity and the submitted Functional Servicing Report.

As per the analysis provided of the Zoning By-law 2020 under Appendix F – Detailed Policy Analysis, staff is of the opinion that the proposed amendments, as modified by staff, are consistent with Provincial directions, conform to the Regional Plan and maintain the general intent of the Local Official Plans and are appropriate for the subject lands

Technical Review

The applications were circulated to internal staff and external agencies on March 10, 2025, for review. The following are summaries of the comments received:

City of Burlington – Finance – staff requests as a condition of development that, “taxes must be paid on parcels associated with this file. This includes all outstanding balances plus current year taxes that have been billed but not yet due.”

City of Burlington – Development Engineering – staff have no objection to the Official Plan and Zoning By-law Amendment applications. Additionally, a list of documents and plans to be submitted at the Site Plan application stage has been provided to the applicant.

City of Burlington – Urban Forestry and Landscaping – Urban Forestry and Landscaping staff indicated that the submitted documents do not demonstrate that the owners of the neighboring properties have granted permission for the proposed tree removals. Consent from the owners of the adjacent properties is required prior to the removal of these trees which has been included by way of a holding provision under the amending by-law. Staff encouraged tree number 2 to be retained, within a proposed continuous soil trench or large sod bed with enough soil and space. Additional tree planting within the continuous soil trench/sod bed next to tree number 2 is also encouraged. The submitted Arborist Report outlined that the date of the tree inventory data is September 8, 2021, which exceeded the 365-day limit of tree inventory data. The applicant has now provided a revised Tree Protection Plan and Landscape Concept Plan which also includes the preservation of tree number 2.

City of Burlington – Parks and Open Space – staff wishes to collect cash in lieu of parkland, with CILP charged at the rate in effect at the time of building permit issuance.

City of Burlington – Transportation Planning – staff support the Official Plan and Zoning By-law Amendment application with the proposed land-use and density. Staff requested a draft reference plan (R-Plan), prepared by an Ontario Land Surveyor (OLS) showing the required 5 metres x 5 metres daylight triangle which is required to be conveyed to the City and dedicated to the right-of-way. The applicant has provided the requested information; therefore staff have no outstanding comments for the Official Plan and Zoning By-law Amendment. Staff also provided future site plan considerations which have been provided to the applicant and note four (4) commercial parking spaces are in a lay-by on Cooke Boulevard, lay-bys are not

supported within the City's right-of-way and shall be removed from the site plan for subsequent applications.

City of Burlington – Fire – No comments.

City of Burlington – Heritage Planning – No comments or concerns.

City of Burlington – Zoning – Amendments required to the Zoning By-law have been identified and included as part of the amending by-law under Appendix D – Zoning By-law Amendment to reflect the proposed development.

Halton Region – The servicing issues related to the existing downstream sanitary sewer capacity issues are a significant concern to the Region. Due to this, regional staff recommended that the development application should not proceed until the proposed trunk sewer replacement on Cooke Boulevard and Plains Road East has been constructed and operational. Halton Region staff requested that the submitted Functional Servicing Report (FSR) be revised to include flow analysis that is based on current design standards in the Region's Linear Design Manual (LDM). Therefore, City Planning staff have included a holding provision on the zoning application as suggested by regional staff to accommodate the Region's concerns in relation to the trunk sewer replacement and the required revised FSR as outlined under the amending By-law under Appendix D – Zoning By-law Amendment. Additionally, a Waste Management Plan is required to address waste collection for the proposed development, this can be provided at a later Site Plan application.

Halton Police – No concerns with the applications as it does not interfere with the line-of-sight radio system.

Halton Catholic District School Board – no objections to the application. In terms of school accommodation, if the residential development were to proceed today, elementary students generated from the development would be accommodated at Holy Rosary (B) CES located at 261 Plains Road East. Secondary school students would be directed to Assumption CSS located at 3230 Woodward Avenue. Staff require conditions to be placed in subsequent agreements (e.g. Subdivision, Condominium, and Site Plan) and are to be fulfilled prior to final approval.

Halton District School Board – no objections to the application. Staff provided an overview of the potential impact of this development application on student accommodation needs as well as conditions to be placed in subsequent agreements (e.g. Subdivision, Condominium, and Site Plan) and are to be fulfilled prior to final approval.

Conservation Halton (CH) – No comments. Conservation Halton does not regulate the subject lands, and given the small size would defer stormwater management review to the City.

Burlington Hydro – Staff have indicated that the proposed development is located within the hydro distribution system that has very limited capacity to support this development and

requested a detailed loading estimate for the development to determine capacity availability in the area as well as transformer sizing. Additionally, there is an obstruction free zone of 3 metres surrounding the proposed transformer and overall equipment. Planting shrubs, trees or flowers, or buildings of fences or walls in the obstruction free zone around transformer or switchgears is not allowed; also, the obstruction free zone cannot be used for snow storage. The applicant has provided a detailed loading estimate to Burlington Hydro staff and additional details on the placement of the transformer, comments related to these items are to be addressed at the detailed Site Plan design stage.

Aldershot Business Improvement Area (ABIA) – The Aldershot BIA supports development that includes retail and commercial space on strategic streets, such as Plains Road (located with the Aldershot MTSA), to support a wide range of amenities in the ABIA. Groceries must be considered as well as full-service restaurants (including venting), daycare, services, and other uses to serve the day-to-day needs of businesses and increased amount of residents in re-development. As the property is now vacant, the ABIA would welcome some retail/commercial space to support the proposed building. The ABIA would like to see more retail space allocated to ensure there are plenty of amenities for new residents and any existing square footage is maintained or increased in new developments within the MTSA. Along with that, it would benefit any potential commercial tenants to have more dedicated commercial-only parking spots for ease of customer use. City Planning staff is of the opinion that the proposed development provides for appropriate amount of retail and service commercial space at grade and. The proposed amendments include an increase to the minimum required Commercial Floor Area from 220m² to 450m².

Canada Post – No comments.

Enbridge Gas – No comments.

Imperial Infrastructure – No comments.

Rogers Communications – No comments or concerns.

Trans-Northern Pipeline – No infrastructure in the area.

Sun-Canadian Pipeline – No comments.

Recommendation Details

- The proposed amendments are consistent with the Provincial Planning Statement (2024);
- The proposed amendments conform with the Regional Official Plan (2009, as amended);
- The proposed amendments maintain the general intent of the Burlington Official Plan (1997) and have appropriate regard for Burlington Official Plan (2020);

- The proposed development maintains the general intent of Zoning By-law 2020

Key Dates & Milestones

- Pre-application Community Meeting: June 10, 2024
- Application submitted: March 14, 2025
- Application deemed complete: March 14, 2025
- Statutory public meeting: July 8, 2025
- Statutory deadline: July 8, 2025

Implications

Financial

All application fees have been received in accordance with the Development Application Fee Schedule.

Climate

In February 2020, City Council approved the City of Burlington Climate Action Plan to support the City's path towards a low-carbon future, focusing on mitigating greenhouse gases and reducing energy consumption. The Plan identifies seven implementation programs, including, programs to enhance energy performance for new and existing buildings; increase transit and active transportation mode shares; encourage the adoption of electric mobility and equipment through personal and commercial vehicles and other currently gas-powered equipment; and support waste reduction and diversion.

As part of the Official Plan and Zoning By-law Amendment application, the applicant was required to provide consideration to the Sustainable Building and Development Guidelines (2018) which provide an overview of the required and encouraged sustainable design measures for new development across the City. The applicant submitted a Sustainable Building and Development Guidelines Checklist which includes consideration to the guidelines. A detailed review of the Sustainable Building guidelines has been included under Appendix F – Detailed Policy Analysis. Staff is of the opinion the proposed development proposal complies with the required Sustainable Building and Development Guidelines and therefore the development considers the City of Burlington Climate Action Plan to support the City's climate considerations

Engagement Matters

Notice signs were posted on the subject lands on March 28, 2025. A public notice of the Zoning By-law Amendment application was mailed to 157 addresses, which includes all property owners within 120 metres of the subject lands.

A webpage was created on the City of Burlington website, accessible at www.burlington.ca/35plainsroad. This webpage provides information about the subject

application including dates of public meetings, links to supporting studies, and contact information for the applicant's representative and Community Planning Department.

As of the writing of this report, 3 written public comments have been received by staff with respect to the subject application in objection to the proposal. The public comments received to date have been included under Appendix C – Public Comments. The letters received represent positions of opposition with regard to the following themes:

Concerns on population increase and its impact on infrastructure and increased traffic as well as proposed parking rate, illegally parked cars and proposed parking along Cooke Boulevard

Staff comment: The proposed development consists of 161 new residential dwelling units that would serve as additional housing options in the city, and which will be municipally serviced by nearby existing public transit routes. The subject lands are located in close proximity to Burlington Transit bus stops located on the intersection of Plains Road East and Waterdown Road which runs along Plains Road East into the City of Hamilton, the Burlington GO and Appleby GO stations as well as bus stops for Route 4 (Central) which runs along Waterdown Road to the Aldershot GO Station and the Appleby GO Station. The proposed development is also located approximately 800m from the Aldershot GO station and higher-order transit.

Transportation Planning staff indicated support of the application and the proposed land-use and density as the transportation network can accommodate the increase without significant negative impact. Transportation Planning staff also noted four (4) commercial parking spaces are in a lay-by on Cooke Boulevard, lay-bys are not supported within the City's right-of-way and shall be removed from the site plan for subsequent applications.

As a result, Planning staff is of the opinion that the proposed development is an efficient use of the land, resources, infrastructure and public service facilities which are planned and available.

Concerns on size of units and affordability

Staff comment:

According to the City's Housing Strategy targets for all new dwellings in the City, 1- and 2-bedroom dwellings should make up 55 per cent out of the 80 per cent of new Apartment Dwellings. The proposed development includes a breakdown of 56 per cent of 1-bedroom units, 34 per cent of 2-bedroom and 10 per cent of 3-bedroom units. Staff is of the opinion that the proposed development includes an appropriate mix of dwelling unit sizes.

Concerns on impact of the natural environment and wildlife as well as air quality

Staff comment:

The subject lands are designated as "Mixed Use Corridor – Commercial Corridor" under the in-effect Official Plan (1997, as amended). The subject lands are not in close proximity to lands designated as the 'City's Natural Heritage' as per Official Plan 2020 nor are not expected to cause a negative impact onto the natural environment based on the submitted materials and associated reviews. The proposed development has taken into consideration the Sustainable

Building and Development Guidelines as outlined under Appendix F – Detailed Policy Analysis, which aims to protect for environmental impacts of new development proposals.

References

The applicant has submitted the following materials in support of the subject applications:

- **Cover Letter** prepared by KFA Architects and Planners Inc. dated January 20, 2025.
- **Complete Application Form** signed February 10, 2025.
- **Planning Justification Report** prepared by KFA Architects and Planners Inc. dated January 2022.
- **Site Survey** prepared by Rady-Pentek & Edward Surveying Ltd. dated August 18, 2015.
- **Conceptual Site Plan and Architectural Plans** prepared by KFA Architects and Planners Inc. dated January 20, 2025.
- **Shadow Study** prepared by KFA Architects and Planners Inc. dated January 20, 2025.
- **Wind Study** prepared by Gradientwind Engineers and Scientists dated July 4, 2024.
- **Functional Servicing Report** prepared by Schaeffers Consulting Engineers dated February 2025.
- **Noise Feasibility Study** prepared by HGC Engineering dated July 25, 2022.
- **Noise Feasibility Study Addendum** prepared by HGC Engineering dated August 14, 2024.
- **Transportation Impact Study** prepared by NextEng Consulting Group Inc. dated August 22, 2024.
- **Phase One Environmental Site Assessment** prepared by Toronto Inspection Ltd. dated July 14, 2022.
- **Phase One Environmental Site Assessment Update** prepared by Toronto Inspection Ltd. dated June 24, 2022.
- **Sustainable Building and Development Guidelines Checklist** prepared by KFA Architects and Planners Inc. dated January 28, 2025
- **Environmental Site Screening Questionnaire** signed February 10, 2025.
- **Draft Official Plan Amendment** prepared by KFA Architects and Planners Inc.
- **Draft Zoning By-Law Amendment** prepared by prepared by KFA Architects and Planners Inc.
- **Pre-application Community Meeting Minutes** prepared by KFA Architects and Planners Inc. dated June 10, 2024.

- **Burlington Urban Design Panel Minutes** prepared by dated May 30, 2025.
- **Urban Design Brief** prepared by KFA Architects and Planners Inc. dated January 2025.
- **Drive Through Agreement** prepared by KFA Architects and Planners Inc. dated February 10, 2025.
- **Civil Drawings** prepared by Schaeffers Consulting Engineers dated February 4, 2025.
- **Arborist Report** prepared by Adesso Design Inc. dated April 25, 2025.
- **Tree Protection Plan** prepared by Adesso Inc. dated April 25, 2024.
- **Landscape Concept Plans** prepared by Adesso Design Inc. dated January 29, 2025
- **Structural Engineering Letter** prepared by Sigmund Soudack and Associates Inc. dated March 8, 2023.
- **Pre-consultation Meeting Notes** prepared by City of Burlington dated August 9, 2025.
- **Revised Parking Specifications I** provided by KFA Architects and Planners Inc. dated April 25, 2025.
- **Revised Parking Specifications II** provided by KFA Architects and Planners Inc. dated April 25, 2025.
- **Revised Parking Specifications III** provided by KFA Architects and Planners Inc. dated April 25, 2025.
- **Revised Waste Management Plan** provided by KFA Architects and Planners Inc. Dated May 23, 2025.
- **Revised Traffic Impact Study Addendum** prepared by NextEng Consulting Group Inc. dated May 8, 2025.
- **Revised Underground Parking Architectural Plans** prepared by KFA Architects and Planners Inc. dated May 23, 2025.
- **Revised Reliance Letter** prepared by HGC Engineering dated May 16, 2025.
- **Revised Functional Servicing Report** prepared by Schaeffers Consulting Engineers dated May 2025.
- **Revised Tree Protection Plan and Landscape Concept Plan** prepared by Adesso Design Inc. dated May 22, 2025.
- **Revised Electrical Loading Schedule** prepared by Venneri Consulting Engineers Ltd. dated May 17, 2025
- **Revised Transformer Plans** prepared by Venneri Consulting Engineers Ltd. dated May 23, 2025

The supporting documents have been uploaded on the City's website for the subject application which can be found on the following link www.burlington.ca/35plainsroad.

Conclusion

Staff have evaluated the applications for Official Plan and Zoning By-law Amendment for 35 Plains Road East in accordance with all applicable policies, regulations, and guidelines, and with consideration for comments received from technical reviewers and the public. Staff is of the opinion that the proposed development, as modified by staff, is consistent with the Provincial Planning Statement (2024); conforms with the Region of Halton Official Plan; and maintains the general intent of the policies of the City of Burlington Official Plan (1997, as amended) and City of Burlington Official Plan (2020). Staff are therefore recommending approval, with modification, of the subject applications.

Strategic Alignment

- ☑ Designing and delivering complete communities
- ☐ Providing the best services and experiences
- ☑ Protecting and improving the natural environment and taking action on climate change
- ☐ Driving organizational performance

Author:

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Planner, Community Planning Department
905-335-7600 Ext. 7536
mariana.dasilva@burlington.ca

Appendices:

A. Existing Zoning
B. Concept Plan
C. Public Comments
D. Draft Official Plan Amendment
E. Draft Zoning By-law Amendment
F. Detailed Policy Analysis

Draft By-laws for Approval at Council:

- By-law to Special Council meeting on July 8, 2025 (subject to subsequent appeal period prior to coming into force and effect).

Notifications:

2816544 Ontario Inc (c/o Jose Cruz)

KFA Architects and Planners Inc (c/o Luca Chandler)

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Sketch No. 3

EXISTING ZONING

Application to amend the Official Plan Designation and Zoning for the property located at 35 Plains Rd.

SUBJECT PROPERTY

File Nos. 505-05/25 & 520-06/25



GENERAL ZONING LEGEND						
Low Density	Medium Density	High Density	Mixed Use	Commercial	Employment	Other
			MXC MXE MXG			

Date: March 11, 2025
Community Planning Department

TERANET CITY OF Burlington

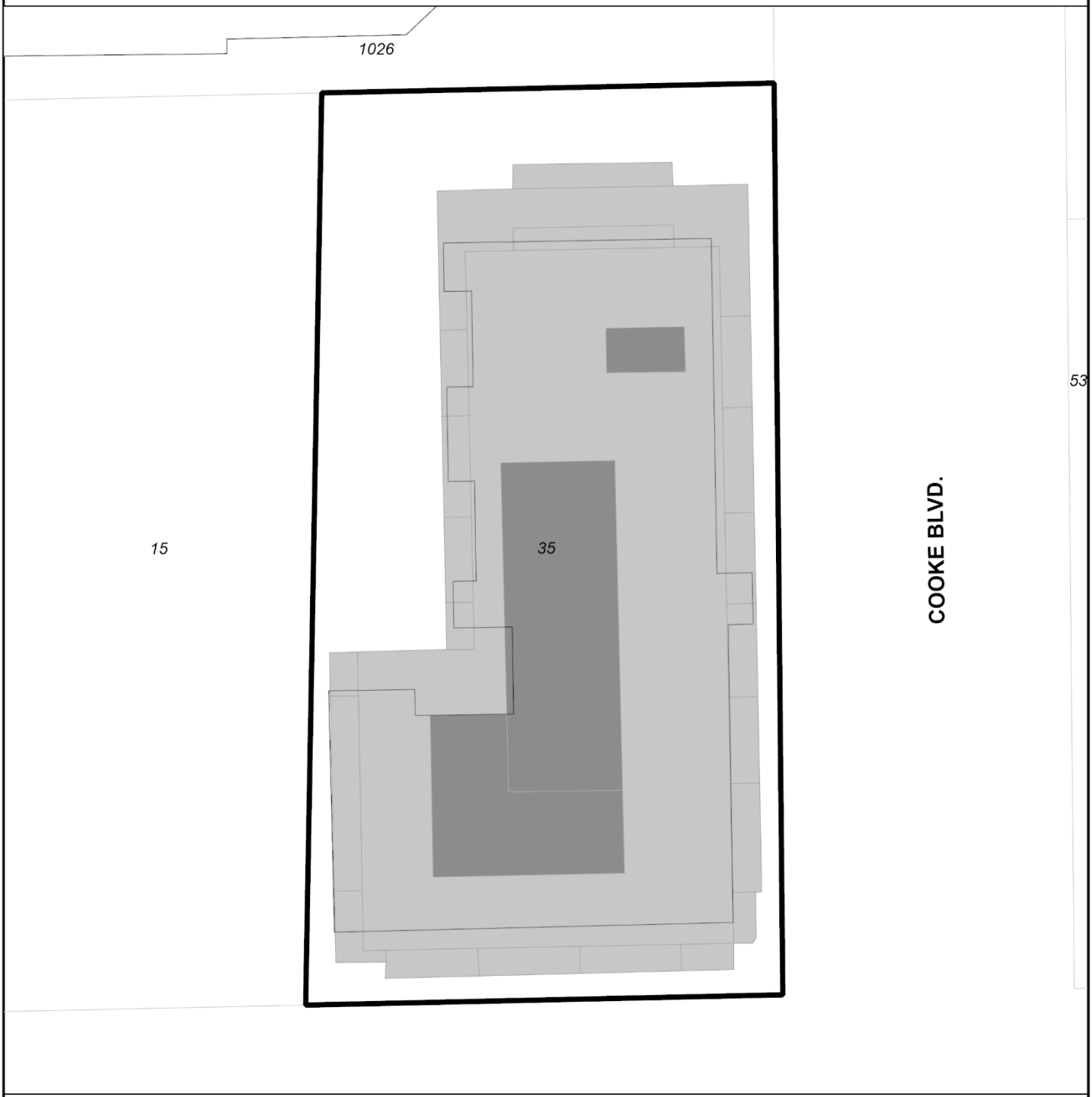
Sketch No. 1

CONCEPT PLAN

Application to amend the Official Plan Designation and Zoning for the property located at 35 Plains Rd.

File Nos. 505-05/25 & 520-06/25

SUBJECT PROPERTY



Date: 3/11/2025

Community Planning Department

0 10 20

Meters

Da Silva, Mariana

From: Anne Campbell [redacted]
Sent: Friday, April 25, 2025 6:47 AM
To: Da Silva, Mariana
Subject: Fwd: File: 505-05/25 and 520-06/25burlington.ca/35plainsroad

Follow Up Flag: Follow up
Flag Status: Completed

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Minor correction from 27 to 72 units on second paragraph.

---------- Forwarded message ---------
From: **Anne Campbell** [redacted]
Date: Thu, 24 Apr 2025 at 14:39
Subject: File: 505-05/25 and 520-06/25burlington.ca/35plainsroad
To: <mariana.dasilva@burlington.ca>

Hello Mariana,
I would like to provide a little feedback on this proposed amendment for the condos at 35 Plains Road. Proposals for this site that have been approved by council have all been abject failures to date. The first proposal dates back to the late 2015 and early 2016, with the first public meeting held at St. Matthews on the Plains June 22,2016 for an 8 storey condo with 80 units. Council finally approved an 8 storey complex comprised of 72 units advertised as "boutique condo living".This first development never materialized and the land sat vacant for many ,many years until it was sold. The next proposal from the Janik Group called for 8 stories and 72 units,shortly followed by an amendment for 9 storey's which was approved. However, this build never materialized either. This was a suitable build of adequately sized units 1-3 bedroom units even given the less than ideal site of under 1/2 acre.

This new proposal for a 12 storey 161 residential units is totally unacceptable. How can you add 4 floors on the exact same footprint and yet increase the number of units from 72 to 161 units , a 140% increase.This will be just another failed endeavor of useless sized units. What you end up with is a building filled with shoebox condos that were only popular in the past with investors. There is little sentiment for these in 2025 as they appear unsellable, but more importantly do little to meet the needs of families. The floors from 2-8, will now be comprised of 15-18, 500-600 sq.ft. units. instead of 9 decent sized units. Of the 11 units on each of the floors 9-12, there are only 3 units that are just slightly above 1000sq.ft., so only 12 units of the 161 available that one would consider meets the needs of a family. Pretty sad.

Governments are touting the need for affordable homes for families, this is not it. One other concern we have is that the congestion on Plains Road makes it an agonizing route at any time of the day, but after the hour of 3 PM becomes almost impassable in the area of Plains and Waterdown Road. I would not be in support of such a project as this one.

Best Regards,
Peter and Anne-Marie Campbell

Da Silva, Mariana

From: Brigid Murphy [redacted]
Sent: Thursday, April 10, 2025 8:50 PM
To: Da Silva, Mariana
Subject: Cooke Blvd development

Follow Up Flag: Follow up
Flag Status: Flagged

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Greetings Mariana

Is no one aware of the already overpopulation on our infrastructure and traffic patterns??? The complete degradation of what was once Burlingtons lakeside orchards and agricultural greenspace?

This is pure insanity.
Pure greed.
Pure desecration of light, air, and habitat.
It will all end.
Even the trumpeter swans will move elsewhere.

Beyond tragic.
Beyond comprehension.
And where will the children play?
What air will they breathe?
And the wildlife?????
All rats you can fathom, just to be clear, like NYC.

God help you all.

Brigid

Da Silva, Mariana

From: Sandy Walker [redacted]
Sent: Tuesday, April 22, 2025 11:14 AM
To: Da Silva, Mariana
Subject: Application for 35 Plains Road East

Follow Up Flag: Follow up
Flag Status: Flagged

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi
I am writing to express my concerns regarding development at 35 Plains Road East.

[redacted]We already experience issues with unauthorized parking in our lots, by people unable to find parking at the GO station. Throughout the winter, there were many illegally cars parked on Masonry Drive, likely because of overflow from the GO station.

I have serious concerns that a building of 161 residential units has only 110 vehicle parking spaces, and even worse, 6 visitor spaces.
There is no street parking available on Cooke Boulevard, nor should there be. There are numerous transport truck deliveries to our businesses and to others located on Cooke Boulevard.

As business owners, we should not have to deal with illegally parked cars in our private parking lots at any time, especially when the businesses are closed during the night and on weekends.
There is no bylaw enforcement during these hours.

Regards,
Sandy Walker

AMENDMENT NO.162 TO THE OFFICIAL PLAN OF THE CITY OF BURLINGTON PLANNING AREA

CONSTITUTIONAL STATEMENT

The details of the Amendment, as contained in Part "B" of this text, constitute Amendment No.162 to the Official Plan of the City of Burlington Planning Area, as amended.

PART A – PREAMBLE

1. PURPOSE OF THE AMENDMENT

The purpose of this amendment is to permit a 13-storey mixed use building consisting of ground floor retail and service commercial uses with 161 residential units above and access to Cooke Boulevard.

2. SITE AND LOCATION

The subject lands are located on the northwest corner of Plains Road East and Cooke Boulevard. The subject lands are approximately 0.20 hectares in size, and it is currently vacant.

Surrounding land uses consist of a mix of employment, commercial, office industrial and residential uses.

3. BASIS FOR THE AMENDMENT

a) The subject application proposes intensification that is consistent with the Provincial Policy Statement (PPS), 2024. The PPS promotes a range and mix of uses and housing that efficiently uses land, resources, infrastructure, and public service facilities and is supportive of public transit.

b) Intensification of land within built-up, serviced areas of the City makes more efficient use of existing developed lands and provides employment opportunities which meets the intent of the Region of Halton Official Plan.

c) The proposed development supports the City's objective to broaden the range of housing forms and supply to meet City needs in a manner that is compatible with surrounding properties and uses.

d) The proposed development is located on lands with adequate infrastructure and in close proximity to transit routes, commercial uses and community amenities so satisfies Official Plan policies to provide housing opportunities

in locations that can reduce travel times and decrease dependence on the car.

e) The applicant submitted technical studies that provide adequate and appropriate information to support the development.

PART B – THE AMENDMENT

1. DETAILS OF THE AMENDMENT

Map Change: None proposed.

Text Change:

The text of the Official Plan of the City of Burlington, as amended, is hereby amended as follows:

By deleting site-specific policy 5.3.3.2 m) in Part III, Land Use Policies – Urban Planning Area, Section 5.3.3 Mixed Use Corridor – Commercial Corridor, and replacing it with the following policy:

35 Plains Road East

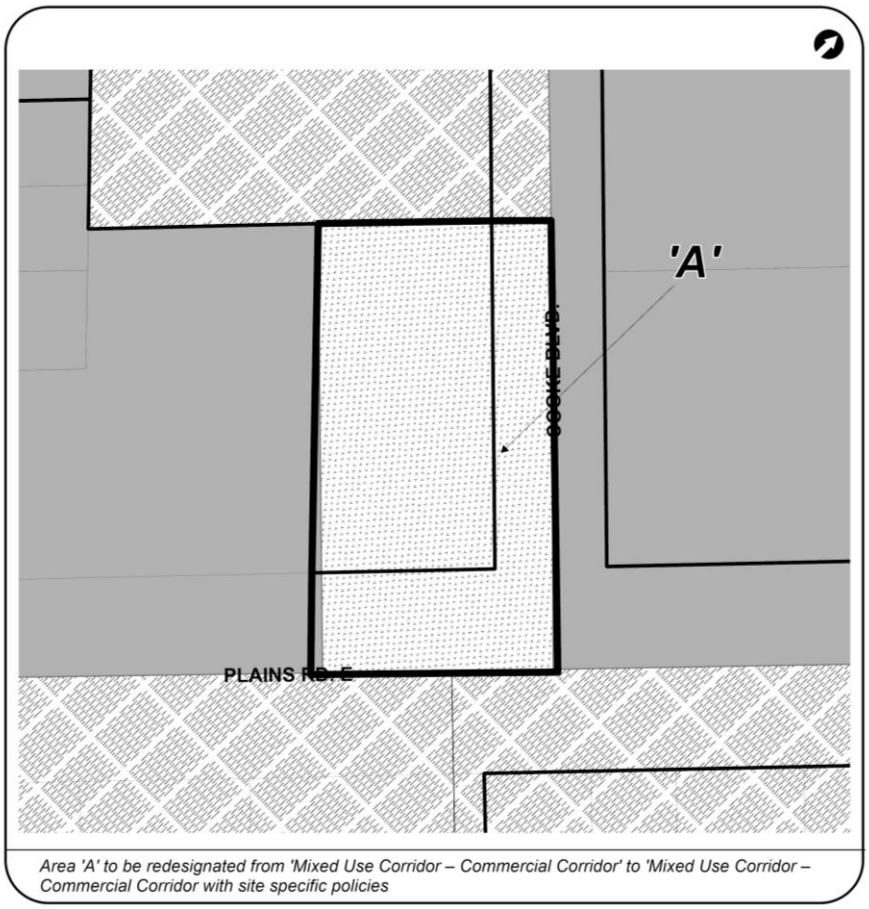
m) Notwithstanding the use, height, *floor area ratio* and design policies contained in Part III, Subsections 5.3.2 a), d) and g), and Part III, Subsections 5.3.3.2 b) and e) of this Plan, for the property identified as 35 Plains Road East, the following policies *shall* apply:
   (i) a mixed use building consisting of residential and at-grade retail or *service commercial shall* be permitted;
   (ii) the maximum building height *shall* be 13 storeys;
   (iii) the maximum *floor area ratio shall* be 6.9:1.

2. INTERPRETATION

This Official Plan Amendment shall be interpreted in accordance with the "Interpretation" policies of Part VI, Implementation, Section 3.0, Interpretation, of the Official Plan of the City of Burlington.

3. IMPLEMENTATION

This Official Plan Amendment will be implemented in accordance with the appropriate "Implementation" policies of Part VI, of the Official Plan of the City of Burlington.



Area 'A' to be redesignated from 'Mixed Use Corridor – Commercial Corridor' to 'Mixed Use Corridor – Commercial Corridor with site specific policies

AMENDMENT No. 162 TO THE OFFICIAL PLAN OF THE BURLINGTON PLANNING AREA

Schedule 'B'

File No. 505-05/25

Legend

- MUC - Employment
- MUC - Commercial
- MUC - General

Date: May 14, 2025
Community Planning Department

Draft Zoning By-law

BY-LAW NUMBER 2020.507, SCHEDULE 'A' AND EXPLANATORY NOTE

THE CORPORATION OF THE CITY OF BURLINGTON

BY-LAW NUMBER 2020.507

A By-law to amend By-law 2020, as amended; for 35 Plains Rd. E.,
File No.: 520-06/25 and 505-05/25

WHEREAS Section 34(1) of the Planning Act, R.S.O. 1990, c. P. 13, as amended, states that Zoning By-laws may be passed by the councils of local municipalities; and

WHEREAS the Council of the Corporation of the City of Burlington approved Recommendation DGM-40-25 on July 8, 2025, to amend the City's existing Zoning By-law 2020, as amended, to permit the development of a 13-storey mixed use building consisting of ground floor retail and service commercial uses with 161 residential units above for the lands located at 35 Plain Rd. E., Burlington;

THE COUNCIL OF THE CORPORATION OF THE CITY OF BURLINGTON HEREBY ENACTS AS FOLLOWS:

1. Zoning Maps Numbered 3-E & 3-W of PART 15 to By-law 2020, as amended by By-law 2020.384, is hereby further amended as shown on Schedule "A" attached to this By-law.

2. In addition to site-specific exception MXC-470, the lands designated as "A" on Schedule "A" attached hereto are also subject to Exception MXC-565.

3. PART 11 of By-law 2020, as amended, Holding Zone Provisions, is hereby amended by adding the following section to Appendix A:

#100	H-MXC-565	Map	3-E & 3-W	Resolution:

The Holding symbol shall be removed from the zone designation by way of an amending zoning by-law when the following has been completed:

a) A written consent letter from the neighbouring property owner confirming any required injury and/or removal of trees following completion of the pre-construction exploratory root investigation

exercise (if required) and report to the satisfaction of the Manager of Parks, Design and Construction.

b) A trunk sewer replacement on Cooke Boulevard and Plains Road East has been constructed and operational to the satisfaction of Halton Region.
c) A revised Functional Servicing Report is submitted to the satisfaction of Halton Region.

4. PART 14 of By-law 2020, as amended, Exceptions to Zone Designations, is amended by adding Exception H-MXC-565 with the following:

Exception 565	Zone H-MXC	Map 3-E & 3-W	Amendment 2020.507	Enacted July 8, 2025

The provisions of Exception 470 shall apply, except as follows:

1. Regulations for an Apartment Building set out in Section 1. of Exception 470 shall be deleted and replaced with the following:

a) Number of units: 161 units maximum

b) Definitions:

Podium: means the lower portion or base of a mid-rise or tall building, including the ground floor and storeys above, which is clearly differentiated from the building portions vertically above it, and is designed to define and frame the street edge and public realm at an appropriate scale.

Tower: Means that portion of a building located vertically above a Podium, which provides stepbacks from the façade of the exterior podium walls below.

Stepback: The horizontal recess of an exterior main wall of an upper building or tower from the exterior main wall of the podium or storey(s) immediately below

c) Building height: 13 storeys up to 46.7m maximum including mechanical penthouse measured from fixed grade from Plains Road East

d) Podium height:
   i) Abutting all yards: 6 storeys minimum
   ii) Abutting Plains Road East: 7 storeys maximum

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	6 storeys maximum within 11m of the south side yard
iii) Abutting Cooke Boulevard:	8 storeys maximum 6 storeys maximum within 15m of the rear yard

iv) A podium is not required for a building elevation facing the rear yard which provides a minimum 38m setback to the rear lot line

e) Yard abutting Cooke Boulevard:

i) Storey 1:	3 m minimum to building 1.9 m to stair enclosure 3.5 m maximum to building
ii) Podium:	1.3 m
iii) Tower:	3.3 m
iv) Storey 13:	10 m 6.3 m to stair enclosure

f) Yard abutting Plains Road East:

(i) Storey 1:	3 m minimum to building 2.9 m to stair enclosure 3.5 m maximum
v) Podium:	1.8 m
vi) Tower:	3.6 m
vii) Storey 13:	8.6 m

g) Rear Yard:

(i) Storey 1	15.2m
(ii) Podium:	6.9 m
(iii) Tower:	11.1 m
(iv) Storey 13:	16 m

h) South Side Yard:

(i) Podium:	8 m, 1.2 m within 24 m of Plains Road East
(ii) Tower:	10 m, 3.1 m within 24 m of Plains Road East
(iii) Storey 13:	8.2 m

i) Maximum yard requirements abutting a street do not apply above the first storey

j) Below-grade parking garage:

i) Abutting Cooke Boulevard:	0.2 m
ii) Abutting all other lot lines:	0.4 m

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iii) Abutting South Side Yard: 0.5 m to covered parking ramp including associated rooftop Amenity Area

k) Stepbacks:
   i) A 1.8m stepback is required from the exterior wall of the podium to the exterior wall of the tower.
   ii) Storey 13: Provide a 2 m stepback from the exterior building wall of the 12th storey

l) Balconies and Terraces:
   i) Balconies may project 1.8m maximum from the wall of the building, provided that:
      a. The sum of the length of the projections of each storey does not exceed:
         (i) Abutting a street: 21m
         (ii) Abutting rear yard: 14m
         (iii) Abutting south side yard: 28m
      b. Balconies are not permitted to project beyond the exterior building wall of the podium storeys abutting a street or south side yard.

   ii) A rooftop terrace and/or common amenity terrace shall maintain the principal building yards of the storey below it.

m) Distance from the hypotenuse of a daylight triangle:
   i) Building or balcony: 0m
   ii) Below-grade parking: 0.4m

n) Visibility Triangle: 5m x 5m

o) Floor area ratio: 6.9:1 maximum

p) Commercial floor area:
A minimum of 450 m² of retail or service commercial on the ground floor of an apartment building.

q) Rooftop amenity:
In addition to an outdoor amenity area, a maximum of 360 m² of floor area may be used for an indoor amenity area, elevator lobby, stairs, mechanical and/or storage rooms.

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r) Landscape area abutting a street: 0m

s) Building height first storey: 6m

t) Amenity Area: 15m^2 per unit

u) Parking:
   i) Occupant and Visitor: none required
   ii) Non-Residential: 6 including 1 designated accessible and 2 car share spaces

v) Designated Accessible Parking:
   i) Where parking facilities are provided, designated accessible parking spaces for the exclusive use of persons with disabilities shall be identified with a provincially regulated vertical sign displaying the international symbol for accessible parking spaces. Designated parking spaces shall be included in the calculation of provided parking and shall be provided in accordance with the following:
      a. Where 5 to 50 parking spaces are provided, 1 designated accessible parking space shall be provided.
      b. Where 51 to 90 parking spaces are provided, 2 designated accessible parking spaces shall be provided.
      c. Where more than 90 parking spaces are provided, 3% of provided parking shall be designated accessible parking spaces.
   ii) Parking spaces, excluding designated accessible parking, can be provided in an automated parking system.
   iii) Notwithstanding Part 1, Section 2.26(1)(a), each automated parking system parking pallet shall have the following minimum dimensions:
      a. width of 5.2 m;
      b. length of 5.2 m;
      c. area of 27 m^2;
      d. vertical clearance of 1.55 m

w) For the purposes of this by-law an automated parking system shall be defined as follows:
   i) An automated system for the purpose of parking and retrieving motor vehicles and without the use of ramping or driveway aisles, and which may include but is not limited to, a vertical lift and the storage of cars on parking pallets.

x) Bicycle parking:
   i) Apartment Building: 0.1 short term bicycle parking spaces per unit

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	0.5 long term bicycle parking spaces per unit
ii) Non-Residential uses:	2 long term bicycle parking spaces plus 1 space per 1,000m^2 GFA 3 short term bicycle parking spaces plus 1 space per 1,000m^2 GFA

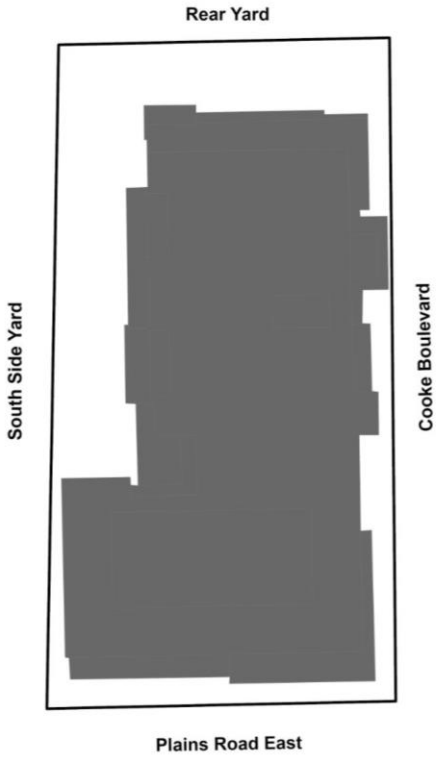
iii) Long term bicycle parking spaces are bicycle parking spaces for use by the occupants, employees or tenants of a building, and must be located in a building.

iv) Required long term bicycle parking spaces in apartment buildings may not be in a dwelling unit, on a balcony or in a storage locker.

v) Short term bicycle parking spaces are bicycle parking spaces for use by visitors to a building.

y) Bicycle parking space size
   i) Horizontal space: 0.6 m x 1.8 m
   ii) Stackable space: 0.45m wide x 1.8 m long x 1.2 m tall
   iii) Vertical space: 1m x 0.6m

DIAGRAM 470



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Except as amended herein, all other provisions of this By-law, as amended, shall apply.

5 a) When no notice of appeal is filed pursuant to the provisions of the *Planning Act*, R.S.O. 1990, c.P.13, as amended, this By-law shall be deemed to have come into force on the day it was passed

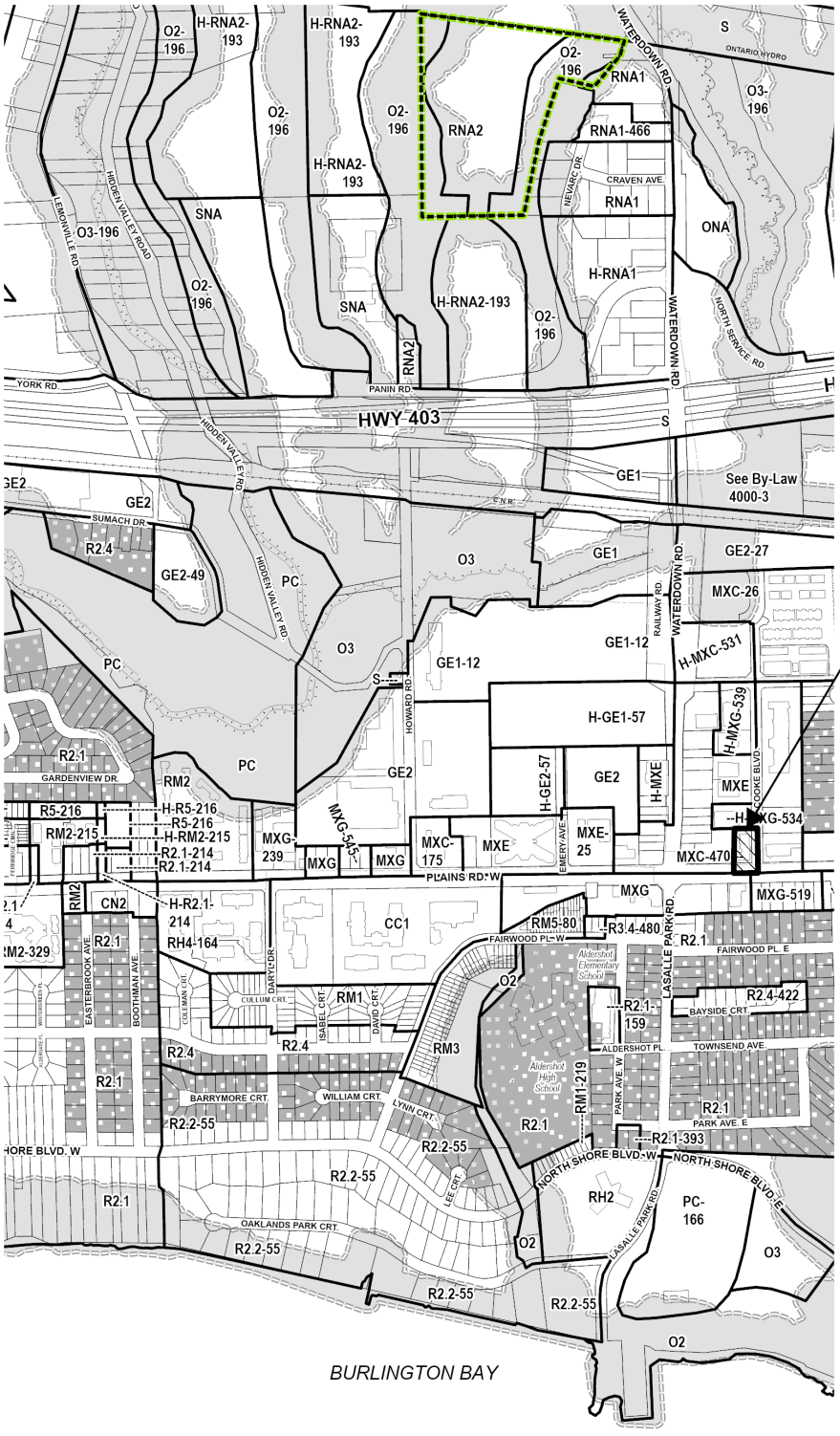
5 b) If one or more appeals are filed pursuant to the provisions of the Planning Act, as amended, this By-law does not come into force until all appeals have been finally disposed of, and except for such parts as are repealed or amended in accordance with an order of the Ontario Land Tribunal this By-law shall be deemed to have come into force on the day it was passed.

ENACTED AND PASSED this ……..day of …… 2025.

_____MAYOR

_____CITY CLERK

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SCHEDULE 'A' TO BY-LAW 2020.507 AMENDING MAP NOs. 3-E & 3-W PART 15, BY-LAW 2020 AS AMENDED. PASSED THE 15th DAY OF JULY, 2025

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MAYOR CITY CLERK

TERANET Burlington
Community Planning Department

EXPLANATION OF PURPOSE AND EFFECT OF BY-LAW 2020.507

By-law 2020.507 rezones' lands on 35 Plains Rd. E. to permit the development of a 13-storey mixed use building consisting of ground floor retail and service commercial with 161 residential units above.

For further information regarding By-law 2020.507, please contact Mariana Da Silva of the Burlington Community Planning Department at (905) 335-7600, extension 7536.

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Detailed Planning Analysis

1.0 The Provincial Planning Statement, 2024 (PPS)

The Provincial Planning Statement (the "PPS") came into force and effect on October 20, 2024, and applies to decisions concerning planning matters occurring after this date. This replaces the Provincial Policy Statement (2020) and A Place to Grow: Growth Plan for the Greater Golden Horseshoe (The Growth Plan) (2019). The PPS provides broad policy direction on matters of provincial interest related to land use planning and development and supports improved land use planning and management, which contributes to a more effective and efficient land use planning system.

In accordance with Section 2.1. 6., Planning authorities should support the achievement of complete communities by:

a) accommodating an appropriate range and mix of land uses, housing options, transportation options with multimodal access, employment, public service facilities and other institutional uses (including schools and associated child care facilities, longterm care facilities, places of worship and cemeteries), recreation, parks and open space, and other uses to meet long-term needs;
b) improving accessibility for people of all ages and abilities by addressing land use barriers which restrict their full participation in society; and
c) improving social equity and overall quality of life for people of all ages, abilities, and incomes, including equity-deserving groups.

In accordance with Section 2.2.1, planning authorities shall provide for an appropriate range and mix of housing options and densities to meet projected needs of current and future residents of the regional market area by:

b) permitting and facilitating
    1. all housing options required to meet the social, health, economic and wellbeing requirements of current and future residents, including additional needs housing and needs arising from demographic changes and employment opportunities; and
    2. all types of residential intensification, including the development and redevelopment of underutilized commercial and institutional sites (e.g., shopping malls and plazas) for residential use, development and introduction of new housing options within previously developed areas, and redevelopment;
c) promoting densities for new housing which efficiently use land, resources, infrastructure and public service facilities, and support the use of active transportation; and

d) requiring transit-supportive development and prioritizing intensification, including potential air rights development, in proximity to transit, including corridors and stations.

The PPS directs that growth and development be focused in 'Settlement Areas'. Settlement Areas include built-up urban areas where development is concentrated, and which have a mix of land uses and lands which have been designated in an Official Plan for development over the long term. Settlement Areas also include Strategic Growth Areas such as Major Transit Station Areas (MTSA), where growth should be mainly focused. The subject lands are found within the 'Aldershot GO MTSA' in accordance with the City's Regional and Local Official Plans as later discussed in this analysis.

In accordance with Section 2.3.1 1. And 2., Settlement Areas shall be the focus of growth as well as development and should be based on densities and a mix of land uses which:

a) efficiently use land and resources;
b) optimize existing and planned infrastructure and public service facilities;
c) support active transportation;
d) are transit-supportive, as appropriate; and
e) are freight-supportive.

Similarly, in accordance with Section 2.4. 2., in order support the achievement of complete communities, a range and mix of housing options, intensification and more mixed-use development Strategic Growth Areas should be planned to:

a) to accommodate significant population and employment growth;
b) as focal areas for education, commercial, recreational, and cultural uses;
c) to accommodate and support the transit network and provide connection points for inter- and intra-regional transit; and
d) to support affordable, accessible, and equitable housing.

The proposed development consists of residential intensification on vacant lands including 161 new residential units that would serve as additional housing options in the city, and which will be municipally serviced by nearby existing public transit routes. The subject lands are located approximately 85 metres from the nearest Burlington Transit bus stops located on the intersection of Plains Road East and Waterdown Road. The intersection includes bus stops for Route 1 (Plains) which runs along Plains Road into the City of Hamilton, and provides access to the Burlington GO and Appleby GO stations as well as bus stops for Route 4 (Central) which runs along Waterdown Road to the Aldershot GO Station, downtown and the Appleby GO Station. The proposed development is also located approximately 800m from the Aldershot GO station and higher-order transit. As a result, staff are of the opinion that the proposed development is an efficient use of the land, resources, infrastructure and public service facilities which are planned and available.

In accordance with Section 2.4.1 3., planning authorities should identify the appropriate type and scale of development in strategic growth areas and the transition of built form to adjacent areas as well as permit development and intensification within these to support

the achievement of complete communities and a compact built form. The proposed development has considered transition to adjacent areas based on the applicable Official Plan design policies and associated Design Guidelines while providing for residential intensification as later discussed in this analysis.

In accordance with Section 2.4.2 2., within MTSAs on higher order transit corridors, planning authorities shall plan for a minimum density target of 160 residents and jobs combined per hectare for those that are served by light rail or bus rapid transit. The City's Integrated Mobility Plan (IMP) envisions the Plains Road East a future Bus Rapid Transit Corridor with dedicated lanes.

In accordance with Section 2.4.2 3., planning authorities are encouraged to promote development and intensification within MTSAs, where appropriate, by planning for land uses and built form that supports the achievement of minimum density targets; and supporting the redevelopment of surface parking lots within major transit station areas, including commuter parking lots, to be transit-supportive and promote complete communities. Similarly, Section 2.4.2 6., all MTSAs should be planned and designed to be transit-supportive and to achieve multimodal access to stations and connections to nearby major trip generators by providing, where feasible: connections to local and regional transit services to support transit service integration; infrastructure that accommodates a range of mobility needs and supports active transportation, including sidewalks, bicycle lanes, and secure bicycle parking; and commuter pick-up/drop-off areas. The proposed redevelopment will provide compact intensification that contributes to the provincially mandated minimum density targets. Additionally, the proposal promotes a multi-modal transportation split by connecting the development with bicycle paths, walking infrastructure, and local transit.

In accordance with the energy conservation, air quality and climate change policies, Section 2.9 describes that planning authorities Planning authorities shall plan to reduce greenhouse gas emissions and prepare for the impacts of a changing climate through approaches that:

a) support the achievement of compact, transit-supportive, and complete communities;
b) incorporate climate change considerations in planning for and the development of infrastructure, including stormwater management systems, and public service facilities;
c) support energy conservation and efficiency;
d) promote green infrastructure, low impact development, and active transportation, protect the environment and improve air quality; and
e) take into consideration any additional approaches that help reduce greenhouse gas emissions and build community resilience to the impacts of a changing climate.

The proposed development contemplates redeveloping the existing subject lands from an underutilized property to a 13-storey mixed use building with 161 residential units and ground floor retail and service commercial which would be served by existing and planned

servicing infrastructure as well as public service facilities that currently serve the surrounding neighbourhood area. Additionally, as later discussed in this analysis, the applicant provided a checklist of the Sustainable Building Design Guidelines and demonstrated how these have been included as part of the development proposal through building design strategies. These help ensure that negative impacts to air quality and climate change are minimized, that energy efficiency is promoted and prepare for the impacts of a changing climate.

In accordance with the public spaces, recreation, parks, trails and open space policies under Section 3.9 1., the plan describes that healthy and active communities should be promoted by:

a) planning public streets, spaces and facilities to be safe, meet the needs of persons of all ages and abilities, including pedestrians, foster social interaction and facilitate active transportation and community connectivity;
b) planning and providing for the needs of persons of all ages and abilities in the distribution of a full range of publicly-accessible built and natural settings for recreation, including facilities, parklands, public spaces, open space areas, trails and linkages, and, where practical, water-based resources;
c) providing opportunities for public access to shorelines; and
d) recognizing provincial parks, conservation reserves, and other protected areas, and minimizing negative impacts on these areas.

The proposed development provides for access to private outdoor amenity area as well as landscaped public boulevards along Plains Road East and Cooke Boulevard. The City's Engineering Services Accessibility staff have also reviewed the development application and have no comments or concerns on the proposed development and associated Official Plan Amendment and Zoning By-law Amendment.

As per the analysis provided, planning staff is of the opinion that the proposed Official Plan Amendment and Zoning By-law Amendment are consistent with the PPS.

3.0 Halton Region Official Plan (ROP)

The Halton Region Official Plan (the "ROP") describes that it provides for "broad policy directions on strategic matters such as management of land and natural resources, growth strategies, housing, economic development, water and wastewater services, solid waste management, transportation, and health and social services". The Planning Act requires that Burlington's Official Plan and Zoning By-law be amended to conform with the ROP.

In accordance with Map 1H – Regional Urban Structure of the ROP, as amended, the subject lands are designated 'Urban Area', are considered a Strategic Growth Area as they are found within a Major Transit Station Area (MTSA) and are located along Plains Road East which is designated as Regional Intensification Corridor 'Plains-Fairview

Corridor'. In accordance with Section 72, the Urban Area policies of the ROP identify that the goal of the Urban Area and the Regional Urban Structure is to manage growth in a manner that fosters complete communities, enhances mobility across Halton, addresses climate change, and improves housing affordability, sustainability, and economic prosperity.

In accordance with Section 74, the Urban Area consists of areas designated within the Regional Urban Boundary as delineated on Map 1, where urban services are or will be made available to accommodate existing and future urban development and amenities. Furthermore, Section 75 describes that the Urban Area is planned to accommodate the distribution of population and employment for the Region and the Municipalities as shown in Table 1, the intensification and density targets as shown in Table 2 of the ROP. For the City of Burlington, these indicate a population target of 240,050 people as well as a density target of 20,500 Housing Units by 2041. The subject lands are within a Built up Area as they are located within the Built Boundary.

In accordance with Section 79.3 it is policy of the region to direct development with higher densities and mixed uses to Strategic Growth Areas. Furthermore, Section 81 describes that some the objectives of the Major Transit Station Areas, are to provide a range and mix of transit-supportive uses, such as residential, retail, office and public uses, as well as public service facilities and parks and open spaces that support the area in a pedestrian-oriented urban environment while considering contextually appropriate intensification opportunities to ensure the protection of neighbourhood character. Similarly, in accordance with Section 82.3, some of the objectives of Regional Intensification Corridors are to recognize Strategic Growth Areas in the Region and accommodating higher-density mixed use development and/or a mix of employment uses appropriate to the existing local context as well as to achieve increased residential and employment densities in order to ensure the viability of existing and planned transit. The proposed development is intended to provide intensification of a mix of uses that support a pedestrian-oriented urban environment and existing as well as planned transit while ensuring the neighbourhood character is preserved. The proposed development has been reviewed against the applicable Official Plan design policies and associated Design Guidelines as later discussed in this analysis.

In accordance with Section 84, the goal for housing is to supply the people of Halton with an adequate mix and variety of housing to satisfy differing physical, social and economic needs. Section 85 further describes that some of the objectives of housing in the Region of Halton include: to make more efficient use of existing developed lands, housing stock and available services to increase the supply of housing while maintaining the physical character of existing neighbourhoods and encourage the Local Municipalities and the building and development industry to develop innovative housing designs that stress flexibility in use, mix of compatible land uses, good environmental practices, universal

physical access, public safety and security needs, cost-efficiency, affordability and energy and natural resource conservation while maintaining sound engineering and planning principles. Furthermore, Section 86 outlines it is the policy of the Region to permit intensification of land use for residential purposes such as infill, redevelopment, and conversion of existing structures provided that the physical character of existing neighbourhoods can be maintained as well as to promote residential intensification through the development or redevelopment of greyfield sites which would include vacant lands. The proposed development is intended to provide 161 new residential dwelling units on a currently vacant property while maintaining the physical character of the existing neighbourhood as later discussed in this analysis.

In accordance with Section 89(3), all new development within the Urban Area is to be connected to the Region of Halton's municipal water and wastewater system. As part of the required materials for the application submission, the applicant provided a Functional Servicing Report (FSR) which was reviewed by Halton Region staff as well as Development Engineering staff. The servicing issues related to the existing downstream sanitary sewer capacity issues are a significant concern to the Region. Due to this, regional staff recommended that the development application should not proceed until the proposed trunk sewer replacement on Cooke Boulevard and Plains Road East has been constructed and operational. Additionally, regional staff requested that the submitted FSR be revised to include flow analysis that is based on current design standards in the Region's Linear Design Manual (LDM). Therefore, City Planning staff have included a holding provision on the zoning application as suggested by regional staff to accommodate the Region's concerns in relation to the trunk sewer replacement and the required revised FSR.

Section 147(17) of the ROP requires the applicant of a development proposal to determine whether there is any potential contamination on the site they wish to develop, and if there is, to undertake the steps necessary to bring the site to a condition suitable for its intended use. The applicant was required to submit an Environmental Site Screening Questionnaire (ESSQ) a Phase One environmental Assessment from the year 2022 as well as a letter of update to this from the year 2024. The submitted materials have been reviewed by Development Engineering staff who have indicated no concerns as well as no further assessment required as no concerns have been raised in terms of potential site contamination.

As per the analysis provided, planning staff is of the opinion that the proposed Official Plan Amendment and Zoning By-law amendment conforms to the ROP.

4.0 City of Burlington Official Plan (1997, as amended)

The City of Burlington's Official Plan (the "OP 1997") provides specific guidance on land use planning and development within the city. The Official Plan includes local principles, objectives and policies for the orderly growth and compatibility of different land uses.

The subject lands are found within the 'Mixed Use Activity Areas' under Schedule 'A' – Settlement Pattern. In accordance with Part III, Section 5.2.1, some of the objectives of this area is to encourage comprehensively planned mixed use employment, shopping and residential areas that provide for the integration of uses such as retail stores, offices, hotels, institutional and entertainment uses with residential uses, community facilities, cultural facilities, institutions and open space in a compact urban form, while retaining compatibility with nearby land uses as well as to ensure Mixed Use Activity Areas are developed in a compact urban form, are pedestrian-oriented and highly accessible by public transit, and foster community interaction.

The subject lands are further designated as 'Mixed Use Corridor - Commercial Corridor' under Schedule 'B' – Comprehensive Land Use Plan – Urban Planning Area. In accordance with Part III, Section 5.3.3.2 a), notwithstanding the policies of Part III, Subsection 5.3.2, the north-west corner of Plains Road East and Cooke Boulevard is generally recognized for lower intensity, retail development than found in the Mixed Use Corridor-General designation as outlined in Part III, Subsection 5.3.2 of the Plan.

In accordance with Part III Section 5.3.3.2 (b) (i), (ii) and (iii), lands within the 'Mixed Use Corridor – Commercial Corridor' designation may permit the following uses:

(i) a range of retail, service commercial and personal service uses; financial institutions and services, a broad range of office uses; entertainment, recreation and other community facilities such as day care centres and motor vehicle dealerships;
(ii) medium and high density residential uses subject to the policies of Part III, Subsection 5.3.2 a) (ii);
(iii) a limited number and range of large-scale retail and service commercial uses such as retail uses up to 5,600 sq. m. in gross floor area where food products are not the principal goods retailed, and retail commercial uses that require either multitenant or freestanding buildings on sites that have significant needs for on-site storage and parking, such as garden centres, automotive commercial, furniture and home furnishing uses and home improvement stores.

In accordance with Part III, Section 5.3.3.2 c), 'Mixed Use Corridors – Commercial Corridor' lands are intended to provide for the retail needs of the residents and businesses within the City and from adjacent areas.

In accordance with Section 5.3.3.2 e), Zoning By-law regulations affecting 'Mixed Use Corridor – Commercial Corridor' locations shall be based on a maximum floor area ratio of 1.5:1 and City Council may consider a higher variation in conjunction with a site specific

rezoning application, subject to the consideration of various factors such as adequacy of services and infrastructure; the provision of compatibility with adjacent uses through measures such as terracing; a high quality of building design, landscaping and streetscaping; and the provision of underground parking. Additionally, the maximum building height shall be 3 storeys, except office and residential uses where the maximum building height shall be 6 storeys.

The proposed development has considered various factors such as adequacy of services and infrastructure. Additionally, the proposed development has been reviewed along the applicable intensification policies under the OP 1997, the envisioned urban design policies of the OP 2020 and the applicable urban design guidelines as later discussed in this analysis.

Part III, Section 5.3.3.2 m), also known as site specific policy 105, outlines that notwithstanding the use, height, floor area ratio and design policies contained in Part III, Subsections 5.3.2 a), d) and g), and Part III, Subsections 5.3.3.2 b) and e) of the OP 1997, for the property identified as 35 Plains Road East shall permit have a mixed use building consisting of residential and at-grade retail or service commercial, a maximum building height shall be 9 storeys and a maximum floor area ratio of 4.4:1. Therefore, the proposed development intends to amend the existing site-specific policy 105 to permit an increased maximum building height of 13-storeys and an increased maximum floor area ratio of 6.9:1.

The criteria listed under Part III, Section 2.5.2 a) shall be considered when evaluating proposals for housing intensification within established neighbourhoods, as follows:

Part III, Section 2.5.2 a) (i): adequate municipal services to accommodate the increased demands are provided, including such services as water, wastewater and storm sewers, school accommodation and parkland.

Staff comment: The City's Development Engineering staff, Halton Region staff, Halton District School Board staff and Halton Catholic District School Board staff have been circulated as part of the technical review process. Halton Region staff have indicated concerns with the existing downstream sanitary sewer capacity and have recommended that the development application should not proceed until the proposed trunk sewer replacement on Cooke Boulevard and Plains Road East has been constructed and operational. Additionally, regional staff requested that the submitted Functional Servicing Report (FSR) be revised to include flow analysis that is based on current design standards in the Region's Linear Design Manual (LDM). Therefore, City Planning staff have included a holding provision on the zoning application as suggested by regional staff to accommodate the Region's concerns in relation to the trunk sewer replacement and the required revised FSR.

Part III, Section 2.5.2 a) (ii): adequate off-street parking.

Staff comment: The application contemplates a rate of 0.68 vehicle occupant parking spaces per unit, resulting in a total of 110 vehicle parking spaces required of which 4 accessible spaces would also be required for a total 161 residential units. Occupant parking spaces are proposed underground while visitor and non-residential spaces are proposed at grade at the rear of the site Additionally, the proposed development also contemplates 6 shared spaces including 1 designated accessible space and 2 car share spaces for the visitor and non-residential vehicle parking. Similarly, the previous development concept proposed 86 spaces including 4 accessible spaces which constituted a rate of approximately 1.19 vehicle occupant parking spaces per unit as well as 6 shared spaces including 2 accessible spaces for the visitor and non-residential vehicle parking. The Ontario government's Bill 185 amended the Planning Act to restrict municipalities from mandating parking requirements in Provincial Major Transit Station Areas and around transit stations, except for bicycle parking. Additionally, Transportation Planning have reviewed the submitted application and related materials and have indicated no concerns with the proposed parking rates. Similarly, Accessibility staff have reviewed the submitted application and related materials and have no comments. As a result, planning staff are of the opinion that the proposed parking rates are appropriate for the proposed development.

Part III, Section 2.5.2 a) (iii): the capacity of the municipal transportation system can accommodate any increased traffic flows, and the orientation of ingress and egress and potential increased traffic volumes to multi-purpose, minor and major arterial roads and collector streets rather than local residential streets.

Staff comment: The City's Transportation Planning staff have reviewed the application as well as the associated materials submitted and have indicated no concerns with the proposed traffic flow generated by the proposed use.

Part III, Section 2.5.2 a) (iv): the proposal is in close proximity to existing or future transit facilities.

Part III, Section 2.5.2 a) (xiii) proposals for non-ground oriented housing intensification shall be permitted only at the periphery of existing residential neighbourhoods on properties abutting, and having direct vehicular access to, major arterial, minor arterial or multi-purpose arterial roads and only provided that the built form, scale and profile of development is well integrated with the existing neighbourhood so that a transition between existing and proposed residential buildings is provided.

Staff comment: The proposed development fronts onto Plains Road East which is designated as a 'Multi-Purpose Arterial' under Schedule J – Classification of Transportation Facilities and contains vehicle and pedestrian access from the interior of the site to Cooke Boulevard. The subject lands are located approximately 85 metres from the nearest Burlington Transit bus stops located on the intersection of Plains Road East and Waterdown. The intersection includes bus stops for Route 1 (Plains) which runs along Plains Road East into the City of Hamilton, the Burlington GO and Appleby GO stations

as well as bus stops for Route 4 (Central) which runs along Waterdown Road to the Aldershot GO Station and the Appleby GO Station. The built form, scale and profile of development is well integrated with the existing neighbourhood and transition between existing and proposed residential buildings is provided as later discussed under this analysis.

Part III, Section 2.5.2 a) (v): compatibility is achieved with the existing neighbourhood character in terms of scale, massing, height, siting, setbacks, coverage, parking and amenity area so that a transition between existing and proposed buildings is provided.

Part III, Section 2.5.2 a) (ix): capability exists to provide adequate buffering and other measures to minimize any identified impacts.

Staff comment: The applications intend to amend the existing site-specific policy 105 to permit an increased maximum building height of 13-storeys and an increased maximum floor area ratio of 6.9:1. Additionally, it proposes to amend the current MXC-407 with a holding provision to address staff concerns as well as site-specific amendments as later discussed in the Zoning By-law 2020 section of this analysis. Staff is of the opinion that the proposed building maintains compatibility with the existing neighbourhood character in terms of scale, massing, height, siting, setbacks, coverage as later discussed under the analysis of the Zoning By-law and applicable Urban Design Guidelines including the Mid-Rise Building Guidelines, Pedestrian Level Wind Study Guidelines and Shadow Study Guidelines. Additionally, as previously mentioned, Transportation Planning have reviewed the submitted application and related materials and have indicated no concerns with the proposed parking rate reductions. Similarly, Accessibility staff have reviewed the submitted application and related materials and have no comments. As a result, planning staff are of the opinion that the proposed parking rates are appropriate for the proposed development.

Part III, Section 2.5.2 a) (vi): effects on existing vegetation from development proposals are to be minimized, and appropriate compensation is provided for significant loss of vegetation, if necessary to assist in maintaining neighbourhood character.

Staff comment: As part of the required materials for the application submission, the applicant provided an Arborist Report, a Tree Protection Plan and Landscape Concept Plans. The City's Urban Forestry and Landscape staff reviewed the submitted materials and indicated that the proposed development is contingent upon the removal of trees with shared ownership and trees located on adjacent properties, which are, trees number 6, 7, 8, 9, 10, 11, 12, 13 and 14. The submitted documents do not demonstrate that the owners of the neighboring properties have granted permission for the proposed tree removals. They will be required to secure consent from the owners of the adjacent properties prior to the removal of these trees. Planning staff therefore included a holding provision under the amending by-law indicating that *"a written consent letter from the neighbouring property owner confirming any required injury and/or removal of trees following completion of the pre-construction exploratory root investigation exercise (if*

required) and report to the satisfaction of the Manager of Parks, Design and Construction". Furthermore, Urban Forestry and Landscaping staff encourage tree number 2 to be retained, within a proposed continuous soil trench or large sod bed with enough soil and space. Additional tree planting within the continuous soil trench/sod bed next to tree number 2 is also encouraged. The submitted Arborist Report outlined that the date of the tree inventory data is September 8, 2021 which exceeded the 365-day limit of tree inventory data. The applicant has now provided a revised Tree Protection Plan and Landscape Concept Plan which also includes the preservation of tree number 2.

Part III, Section 2.5.2 a) (vii): significant sun-shadowing for extended periods on adjacent properties from the proposed development, particularly outdoor amenity areas, is to be at an acceptable level.

Staff comment: The proposed development has been reviewed along the Shadow Study Guidelines and Terms of Reference (2020) and a Shadow Study has been submitted with the subject applications as later discussed in this analysis. Planning staff have no concerns with the proposed development and its potential sun-shadowing impacts as these would remain at an acceptable level, particularly on outdoor amenity areas.

Part III, Section 2.5.2 a) (viii): accessibility exists to community services and other neighbourhood conveniences such as community centres, neighbourhood shopping centres and health care.

Staff comment: The subject lands and directly adjacent properties are found within the 'Mixed Use Activity Areas' under Schedule 'A' – Settlement Pattern. In accordance with Part III, Section 5.2.1, some of the objectives of this area is to encourage comprehensively planned mixed use employment, shopping and residential areas that provide for the integration of uses such as retail stores, offices, hotels, institutional and entertainment uses with residential uses, community facilities, cultural facilities, institutions and open space in a compact urban form, while retaining compatibility with nearby land uses as well as to ensure Mixed Use Activity Areas are developed in a compact urban form, are pedestrian-oriented and highly accessible by public transit, and foster community interaction. Staff is therefore of the opinion that the proposed development provides for accessibility to community services and other neighbourhood conveniences.

Part III, Section 2.5.2 a) (x): where intensification potential exists on more than one adjacent property, any re-development proposals on an individual property shall demonstrate that future re-development on adjacent properties will not be compromised;

Staff comment: Staff are of the opinion that based on the overall Official Plan policies and the associated applicable urban design guidelines, the proposed development would not compromise the development of the nearby and directly adjacent properties.

Part III, Section 2.5.2 a) (xii) where applicable, there is consideration of the policies of Part II, Subsection 2.11.3, g) and m). Part II, Subsection 2.11.3, m), describes that future re-development and intensification in the South Aldershot area may be restricted by

limited storm sewer capacity and the potential for increased downstream flooding and/or erosion as a result of greater levels of storm water runoff due to development. The City may undertake one or more of the following measures to address this concern:

(i) discouraging the reconstruction of existing streets with no curbs or gutters to an urban standard (curbs, gutters and storm sewers);
(ii) where appropriate and feasible, requiring on-site storm water infiltration facilities and other storm water management techniques as part of the design of new development proposals;
(iii) limiting the density or intensity of proposals for re-development and intensification in this area if required.

Staff comment: The proposed development constitutes intensification withtin the Aldershot area and contains servicing issues related to the existing downstream sanitary sewer capacity issues as highlighted as concern by the Region of Halton. Due to this, regional staff recommended that the development application should not proceed until the proposed trunk sewer replacement on Cooke Boulevard and Plains Road East has been constructed and operational. Additionally, regional staff requested that the submitted Functional Servicing Report (FSR) be revised to include flow analysis that is based on current design standards in the Region's Linear Design Manual (LDM). Therefore, City Planning staff have included a holding provision on the zoning application as suggested by regional staff to accommodate the Region's concerns in relation to the trunk sewer replacement and the required revised FSR as outlined under the amending By-law under Appendix D – Zoning By-law Amendment.

As per the analysis provided, planning staff is of the opinion the proposed Official Plan Amendment (as outlined under Appendix D – Amendment No. 156 to the Official Plan of the City of Burlington Planning Area) and the proposed Zoning By-law Amendment is consistent with the intent of the OP 1997.

5.0 City of Burlington Official Plan (2020)

On November 30, 2020, Halton Region issued a Notice of Decision approving a new City of Burlington Official Plan (2020) (the "OP 2020"). The OP 2020 is subject to appeals which are currently before the Ontario Land Tribunal (OLT). For up-to-date information on the status of the OP 2020 and relevant appeals, visit www.burlington.ca/officialplan.

The subject lands are designated as 'Mixed Use Nodes and Intensification Corridors' and are within the 'Aldershot Major Transit Station Area (MTSA) Special Planning Area' boundary under Schedule B – Urban Structure. In accordance with Section 2.3.1 h) MTSAs are intended to serve as city-wide destinations and focal points for the provision of higher intensity and mixed-use land uses, transit supportive development that will accommodate majority of the growth of the City's future population and employment. Furthermore, in accordance with Section 2.3.1 j) 'Mixed Use Nodes and Intensification Corridors' represent areas with a concentration of commercial, residential and employment uses with development intensities generally greater than surrounding areas.

Lands identified as Intensification Corridors consist of areas of streetoriented uses which incorporate a mix of commercial, residential and employment uses, including designated employment lands, developed at overall greater intensities, serving as important transportation routes along higher order transit corridors and selected arterial streets. Mixed Use Nodes and Intensification Corridors will be a focus of reurbanization. These areas will support the frequent transit corridors and provide focal points of activity and a vibrant pedestrian environment and facilitate active transportation through careful attention to urban design, enhancing the opportunities for the location of public service facilities and institutional uses.

The subject lands are further designated as 'Urban Corridor' under Schedule C – Land Use – Urban Area. In accordance with Section 8.1.3 (7.1) c), the following uses may be permitted on lands designated Urban Corridor:

(i) retail and service commercial uses;
(ii) automotive commercial uses, including large-scale motor vehicle dealerships existing on the date this Plan comes into effect;
(iii) residential uses with the exception of single-detached and semidetached dwellings;
(iv) office uses;
(v) entertainment uses; and
(vi) recreation uses.

In accordance with Section 8.1.3 (7.1) j), the permitted retail and service commercial uses and other pedestrian-oriented uses shall be located on the ground floor of office or residential buildings and should be permitted above or below the first storey of buildings. Similarly, Section 8.1.3 (7.1) k) describes that mixed use buildings containing retail and service commercial uses at grade shall be required on sites located within MTSA Special Planning Areas, as shown on Schedule B: Urban Structure, and Schedule B-1: Growth Framework, of this Plan. The subject lands are found within Aldershot GO MTSA and the proposed development includes a mix of retail at grade and residential uses in the above storeys.

In accordance with Section 8.1.3 (7.1) f), a maximum floor area ratio of development of 2.0:1 is an appropriate built form in Urban Corridor lands. An increase to this floor area ratio may occur through a site-specific Zoning By-law amendment or minor variance application, without the need for an amendment to this Plan, provided that the objectives of the Urban Corridor designation are maintained. Similarly, In accordance with Section 8.1.3 (7.1) g), the minimum building height shall be 2-storeys and the maximum building height shall not exceed 6-storeys. Where required to ensure compatibility, 4- to 6-storey buildings may be required to be terraced back from adjacent residential areas and/or the street. Differently, the proposed Community Planning Permit (CPP) Bylaw, envisions buildings of up to 11-storeys on the subject lands.

In accordance with Section 8.1.3 (7.1) m), any proposed development of sites designated Urban Corridor shall retain the planned commercial function of the site, in accordance with the objectives of Subsections 8.1.3(7.1) b) and f), of this Plan, to the satisfaction of the City. Similarly, Section 8.1.3 (7.1) n), describes that the Zoning By-law shall establish a maximum floor area and a maximum floor area at grade per individual retail and service commercial unit, based on such considerations as planned commercial function, built form, and contribution to achieving vibrant, active and walkable built environments in Urban Corridor lands. The existing zoning MXC-470 requires a minimum of 220 m^2 of retail or service commercial to be provided on the ground floor of an apartment building and the underlying MXC zone also regulates a maximum Floor Area per retail or service commercial use of 5600m^2. The proposed H-MXC-565 zone as amended proposes an increased minimum requirement to 450m^2.

The development applications criteria listed under Section 12.1.2 (2.2) c) shall be satisfied when evaluating all development applications, where applicable.

Section 12.1.2 (2.2) c) (i): the development shall be consistent with the land use compatibility policies contained in Section 4.6, Land Use Compatibility, of this Plan.

Staff comment:

In accordance with Section 4.6, the Land Use Compatibility policies describe that major facilities and sensitive land uses shall be planned and developed to avoid, or if avoidance is not possible, minimize and mitigate any potential adverse effects from vibration, noise, dust, odour or other contaminants and minimize risk to public health and safety, and to ensure the long-term operational and economic viability of major facilities, in accordance with provincial guidelines, standards and procedures.

The subject lands are designated as ‘Urban Corridor’ and the properties directly abutting are designated as ‘Urban Corridor – Employment’ which encourages a mix of higher intensity employment uses. The proposed development on the subject lands aims to redevelop the existing vacant property into a 13-storey mixed use building with retail at grade and residential uses above instead of the previously approved 9-storey mixed use building with retail at grade and residential uses above, therefore the uses on the subject lands would remain as retail and residential. Additionally, as part of the required materials for the application submission, the applicant provided a Noise Feasibility Study, an Environmental Site Screening Questionnaire (ESSQ), a Phase One Environmental Assessment and an update to this to reflect the revised proposal. These materials have been reviewed by City Planning staff as well as Development Engineering staff who have indicated no concerns with respect to site contamination and noise generated by the proposed development. Therefore, Planning staff is of the opinion that the proposed development conforms with the policies under Section 4.6 of the OP 2020.

Section 12.1.2 (2.2) c) (iii): the development shall be consistent with the intent of the Section 2.3 – The Urban Structure, of the Plan and maintain the land use vision established in the land use designations of this Plan.

Staff comment: The proposed development is in accordance with the 'Mixed Use Nodes and Intensification Corridors' policies outlined under Section 2.3.1 as previously discussed.

Section 12.1.2 (2.2) c) (v): the development, where located outside the Established Neighbourhood Area as identified on Schedule B-1: Growth Framework, constitutes intensification.

Staff comment:

The subject lands are designated as 'Primary Growth Area' under Schedule B-1 – Growth Framework of the Plan. In accordance with Section 2.4.2.(1) b), Primary Growth Areas shall be recognized as a distinct area within the City's Urban Area accommodating the majority of the city's forecasted growth over and consequently will experience the greatest degree of change; shall be regarded as the most appropriate and predominant location for new tall buildings in accordance with the underlying land use designations, or of an area-specific plan; shall be identified as priority locations for City-initiated area-specific planning and for investments in transit as well as other types of infrastructure and public service facilities, including parks to support population and employment growth; and shall support the frequent transit corridors and accommodate development that is compact, mixed use, and pedestrian-oriented in nature. The subject lands are currently vacant, the proposed development of 13-storeys and mixed-use nature with retail at grade and 161 residential units above constitutes intensification in accordance with the general intent of the underlying land use designations under local, regional and provincial policy and would support existing as well as planned transit and pedestrian routes.

Section 12.1.2 (2.2) c) (ii): the development shall achieve built form compatibility.

Section 12.1.2 (2.2) c) (iv): the development shall achieve high quality urban design and is consistent with the policies contained in Chapter 7 – Design Excellence.

Section 12.1.2 (2.2) c) (viii): the development shall provide buffering, setbacks and amenity area so that an appropriate transition between existing and proposed buildings are provided.

Staff comment:

In accordance with Section 7.3.2 (1) (i), 'Primary Growth Areas' are subject to the design policies of Subsection 7.3.2 a) of the OP 2020, where applicable and additional considerations such as, but not limited to:

a. locating buildings generally parallel to the public street to define the street edge and along the edges of parks, urban squares and other open space features, and in close proximity to the street and transit services;
b. providing appropriate transitions to adjacent land uses, particularly residential uses;

c. massing new buildings to frame adjacent streets in a way that respects the existing and planned street width but also provides for a pedestrian-scale environment;
d. locating building primary public entrances for uses located at grade towards a public right-of-way and visible and accessible from the public sidewalk;
e. including direct pedestrian access, including barrier free access from grade level, to the primary public entrances located on the building façade;
f. screening or integrating roof top mechanical equipment within the overall composition of the building;
g. creating an attractive and connected interface between the private and the public realms;
h. creating a continuous streetscape with emphasis on maintaining the continuity of grade-related activity areas, both inside and outside of buildings; and
i. providing appropriate outdoor amenity areas and open spaces and promoting the incorporation of private open spaces to the open space network of the immediate community.

Staff is of the opinion that the proposed development continues to meet the general intent of this policy section. Policy review of these considerations has been conducted as part of the later sections through the review of the applicable urban design guidelines.

Section 12.1.2 (2.2) c) (vi): the development shall be supported by available infrastructure and public service facilities.

Section 12.1.2 (2.2) c) (xi): the development where residential uses are proposed shall demonstrate the degree to which public service facilities and other neighbourhood conveniences, such as community centres, recreation, neighbourhood shopping centres and healthcare are located within walking distance or accessible by transit.

Staff comment: Staff is of the opinion that the proposed development continues to meet the general intent of this policy section. Policy review of these considerations has been conducted as part of the OP 1997 Part III, Section 2.5.2 a) (viii) as previously mentioned in this analysis.

Section 12.1.2 (2.2) c) (vii): the development shall preserve and protect trees, consistent with the policies contained in Section 4.3, Urban Forestry.

Staff comment: Staff is of the opinion that the proposed development continues to meet the general intent of this policy section. Policy review of these considerations has been conducted as part of the OP 1997 Part III, Section 2.5.2 a) (vi) as previously mentioned in this analysis.

Section 12.1.2 (2.2) c) (xii): the development shall address multi-modal transportation considerations and be consistent with the policies in Section 6.2: Multi-modal Transportation, including but not limited that the development shall mitigate potential impacts on the municipal transportation system to an acceptable level with regard to

transportation flow and capacity and it shall accommodate sufficient off-street parking and transportation demand management measures in accordance with the policies in Subsection 6.2.10.

Section 12.1.2 (2.2) c) (xvi): the development considers the relationship to existing or planned transit facilities including a frequent transit corridor, higher order transit, bus routes and/or transit shelters.

Section 12.1.2 (2.2) c) (xvii): the development complements and connects with the public realm, including walking and cycling facilities.

Staff comment:

The proposed development fronts onto Plains Road East which is designated as a 'Frequent Transit Corridor' and 'MTSA Primary Connector' under Schedule B-2 Growth Framework and Long Term Frequent Transit Corridor as a 'Multi Purpose Arterial' under Schedule O-1 – Classification of Transportation Facilities - Urban Area and as a 'Bike Lane' under Schedule P – Long Term Cycling Master Plan. The subject lands also propose vehicle and pedestrian access from the interior of the site to Cooke Boulevard which is designated as a 'Priority Bike Lane' under Schedule P – Long Term Cycling Master Plan. The subject lands are located in close proximity to public transit as previously mentioned.

Section 12.1.2 (2.2) c) (ix): the development shall demonstrate that future development on the adjacent properties will not be compromised by the proposal and be designed to facilitate future pedestrian, cycling and/or private street connections.

Staff comment: The proposed development is not intended to compromise future development on the adjacent properties, this has been reviewed against the Urban Design Policies as later discussed under this analysis which speak to the related built form impacts onto the adjacent properties. Additionally, the proposed development has been designed to facilitate future pedestrian, cycling and/or private street connections by way of sidewalks and entrances along both Plains Road East and Cooke Boulevard.

Section 12.1.2 (2.2) c) (xiv): the development shall provide stormwater management in accordance with the policies of Subsection 4.4.2(2) of this Plan.

Staff comment: As part of the required materials for the application submission, the applicant provided a Functional Servicing and Storm Water Management Report. Development Engineering staff reviewed the submitted materials and did not indicate concerns with the proposed Storm Water Management.

Planning staff have reviewed the Official Plan Amendment and Zoning By-law Amendment application as well as the materials submitted and are of the opinion that the proposed development conforms to the OP 2020.

6.0 Zoning By-law 2020

The subject property is currently zoned 'MXC-470' ('Mixed-Use Corridor Commercial' with site-specific regulations) under Zoning By-law 2020 as amended (as shown on Appendix A – Existing Zoning Plan). The MXC permits a range of retail and service commercial uses, office, community institutions, hospitality, automotive as well as entertainment and recreation uses. This zone also permits medium and high-density residential uses.

The application requests a Zoning By-law Amendment to rezone the subject lands from 'MXC-470' ('Mixed-Use Corridor Commercial' with site-specific regulations) to 'H-MXC-565' ('Mixed-Use Corridor Commercial' with site-specific regulations and with a holding provision) as amended with new regulations in order to facilitate the development of a 13-storey mixed use building consisting of ground floor retail and service commercial uses with 161 residential units above. City Planning staff have included a holding provision on the zoning application in order to address staff concerns related to the injury and removal of neighbouring trees, trunk sewer servicing capacity and the submitted Functional Servicing Report.

The following table outlines a comparative analysis of the requirements of the base 'MXC' zone, the existing 'MXC-470' zone and the proposed 'H-MXC-565' zone:

Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Number of Units	N/A	72 units maximum	161 units maximum
Staff Comment: The proposed development aims to increase the number of residential dwelling units from 72 to 161 units. In accordance with the policies set out under Provincial, Regional and Local policies for the Aldershot GO Major Transit Station Area as previously discussed, staff are of the opinion that the proposed unit increase is appropriate for the subject lands.			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Building Height	2 storeys minimum 6 storeys maximum	9 storeys to 34 m maximum	13 storeys to 46.7m maximum
Staff Comment: The amending by-law proposes an increased to height from 9 to 13 storeys as well as the associated height to reflect the increased number storeys intended to accommodate the additional 72 residential dwelling units for a total of 161 units. The intent of regulating height is to regulate building overdevelopment of a property as well as mitigate any negative impact that may arise from this. Staff is of the opinion that all potential impacts of overdevelopment have been considered as part of other sections through this report, as a result the proposed height increase and associated development concept is appropriate for the subject lands.			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**

Podium Height	none	Building height for the first storey: 6 m	**Abutting all yards:** 6 storeys minimum **Abutting Plains Road East:** 7 storeys maximum; 6 storeys maximum within 11m of the south side yard **Abutting Cooke Boulevard:** 8 storeys maximum; 6 storeys maximum within 15m of the rear yard A podium is not required for a building elevation facing the rear yard which provides a minimum 38m setback to the rear lot line
Staff Comment: the proposed podium heights are intended to regulate the massing and built form of the proposed building in accordance with the Urban Design guidelines later such as the Mid-rise Building Urban Design Guidelines later discussed in this analysis.			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Yards	**Yard Abutting Cooke Boulevard and Yard Abutting Plains Road:** 3 m minimum; 4.5 m maximum **Rear Yard:** 3m **South Side Yard:** no minimum	**Yard Abutting Cooke Boulevard:** 3.0m minimum; 3.5m maximum; 1.3m for all other storeys **Yard Abutting Plains Road:** 3.0 minimum; 3.5 maximum for 1st storey; 1.8m for all other storeys **Rear Yard:** 3m **South Side Yard:** no minimum	**Yard Abutting Cooke Boulevard:** ranges between 1.9m to 10m **Yard Abutting Plains Road East:** ranges between 1.8m and 8.6m **Rear Yard:** ranges between 6.9m to 16m **South Side Yard:** ranges between 1.2m to 8.2m Maximum yard requirements abutting

			a street do not apply above the first storey
Staff Comment: Generally, most of the setback amendments have been increased in comparison to the existing conditions in order to address any associated impacts of the proposed increased massing and overall built form. Detailed analysis of the proposed yards has been provided under the applicable Urban Design Guidelines review, more specifically under the Mid-Rise Building Design Guidelines. Definitions under the amending by-law have also been included to distinguish the built form of the proposed building. These include definitions for the Podium, Tower and Stepbacks.			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Yards for below-grade parking garage	Abutting Cooke Boulevard: 0m Abutting all other lot lines: 0.2m	Abutting Cooke Boulevard: 0m Abutting all other lot lines: 0.2m	Abutting Cooke Boulevard: 0.2 m Abutting all other lot lines: 0.4 m Abutting South Side Yard: 0.5 m to covered parking ramp including associated rooftop Amenity Area
Staff Comment: the proposed development includes an increase to the yards for the proposed below-grade parking garage. Staff are of the opinion that the proposed amendment is an improvement to the existing conditions.			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Stepbacks	none	none	A 1.8m stepback is required from the exterior wall of the podium to the exterior wall of the tower. Storey 13: Provide a 2m stepback from the exterior building wall of the 12th storey
Staff Comment: the proposed stepbacks are intended to regulate the massing and built form of the proposed building. The stepbacks help ensure a separation between the podium, tower and rooftop mechanical and outdoor amenity areas in accordance with the Mid-Rise Building Urban Design Guidelines as later discussed in this analysis. Definitions under the amending by-law have			

also been included to distinguish the built form of the proposed building. These include definitions of the Podium, Tower and Stepbacks.			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Balconies and Terraces	**balcony projection into a required side yard:** 0.50m maximum **balcony projection into any other required yard:** 1.6 m maximum the sum of the length of these projections does not exceed one third of the permitted length of a building wall the length of any one projection does not exceed 3 m. **terrace encroachment into a required yard:** 0.65m maximum	**Balcony setbacks abutting Cooke Boulevard:** **2nd storey:** 1.3m **3rd to 8th storeys:** 0.5m	**balcony projection:** 1.8m maximum The sum of the length of the projections of each storey does not exceed the following: **Abutting a street:** 21m **Abutting rear yard:** 14m **Abutting south side yard:** 28m Balconies are not permitted to project beyond the exterior building wall of the podium storeys abutting a street or south side yard. A rooftop terrace and/or common amenity terrace shall maintain the principal building yards of the storey below it.
Staff Comment: The amending by-law is intended to include an increase to the maximum permitted 0.5m balcony encroachment into the south side yard and the maximum permitted 1.6m balcony encroachment for all other yards to 1.8m. This regulation would only be applicable to the tower portion of the proposed building. The tower is a new element of the revised concept to reflect the change in building height which helps to ensure appropriate massing. Balconies would not be permitted to extend from the building wall of the proposed podium, except for those proposed along the rear yard. As a result, the balconies will not extend beyond the setbacks of the podium to all property lines. Similarly, the rooftop terrace will not be able to extend from the building wall of the tower. Additionally, to provide appropriate distinction between the tower and podium massing, the sum of the length of the balcony projections has been regulated based on the submitted plans. This			

ensures that the balconies do not extend across the entirety of the building walls and disrupt the intent of the tower design. These design strategies stem from the direction provided under the Mid-Rise Building Urban Design Guidelines as later discussed in this analysis. Staff is also of the opinion that the proposed balcony encroachments and overall dimensions will ensure appropriate amenity space is provided for each dwelling unit.

Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Distance from the hypotenuse of a daylight triangle	For any building or structure: 3m	For a building or balcony: 0m	For a building or balcony: 0m For a below-grade parking: 0.4m

Staff Comment: the proposed development includes an increase to the yards for the proposed daylight triangle. Staff is of the opinion that the proposed amendment is an improvement to the existing conditions.

Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Visibility Triangle	9m x 9m	9m x 9m	5m x 5m

Staff Comment: The proposed development continues to provide for the same 5mx5m Visibility Triangle as the previous Official Plan and Zoning By-law amendment applications submitted back in the year 2016 (File Nos.: 505-03/16 and 520-04/16). The proposed amendment is therefore for formatting purposes. Transportation Planning staff have reviewed the proposed measurement and have no concerns.

Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Floor Area Ratio (FAR)	1.5:1 maximum 0.3:1 minimum	4.4:1 maximum	6.9:1 maximum

Staff Comment: The amending by-law proposes an increased to the Floor Area Ratio (FAR) from 4.4:1 to 6.9:1 to reflect the increased number storeys intended to accommodate the additional 72 residential dwelling units for a total of 161 units. The intent of regulating Floor Area Ratio is to regulate building density and overdevelopment of a property as well as mitigate any negative impact that may arise from this. Staff is of the opinion that all potential impacts of overdevelopment have been considered as part of other sections through this report, as a result the proposed FAR increase and associated development concept is appropriate for the subject lands.

Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**

Commercial Floor Area	5600 m^2 maximum	A minimum of 220m^2 of retail or service commercial must be provided on the ground floor of an apartment building	A minimum of 450m^2 of retail or service commercial on the ground floor of an apartment building
Staff Comment: the proposed development includes an increase to the previously proposed minimum retail space at grade, this ensures that the overall intent of the underlying Official Plans designations is met as previously discussed. Additionally, the wording of the regulation has also been amended for formatting purposes and consistency with other exceptions under Zoning By-law 2020.			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Rooftop Amenity	no maximum	In addition to an outdoor amenity area, a maximum of 275m^2 of floor area may be used for an indoor amenity area, elevator lobby, stairs, mechanical and/or storage rooms	In addition to an outdoor amenity area, a maximum of 360m^2 of floor area may be used for an indoor amenity area, elevator lobby, stairs, mechanical and/or storage rooms.
Staff Comment: the proposed development includes an increase to the proposed amenity Area in order to accommodate appropriate outdoor amenity space for the additional 89 residential units in comparison to the previous development approvals			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Amenity Area	15 m^2 per efficiency dwelling unit 20 m^2 per one-bedroom dwelling unit 35 m^2 per two or more bedroom dwelling unit	1240m^2	15 m^2 per unit (2415m^2)
Staff comment: The proposed development includes an amenity area rate of approximately 10m^2 per dwelling unit which results in approximately 1656.95 m^2 in total amenity area. Staff consider the proposed rate to be well below the appropriate amount of amenity to account for the additional 89 residential units being proposed in comparison to the previous development			

concept. The previous development for a 9-storey mixed use building with retail at grade and 72 residential units included a total of approximately 1240m^2 which reflects a rate of approximately 17m^2 per dwelling unit. Staff are therefore proposing an increase in the minimum required amenity area to a minimum of 15 m^2 per dwelling unit which would result in a total required amenity area of 2415m^2.

Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Vehicle Parking		**Occupant:** 86 spaces including 4 accessible spaces **Visitor and Non-residential:** 6 shared spaces including 2 accessible spaces	**Occupant:** none **Non-Residential:** 6 spaces including 1 designated accessible and 2 car share spaces

Staff Comment: The proposed development contemplates a total of 110 vehicle parking spaces for the 161 residential units proposed. Occupant parking spaces are proposed underground while non-residential spaces are proposed at grade at the rear of the site. Additionally, the proposed development also contemplates 6 parking spaces including 1 designated accessible spaces for the non-residential vehicle parking. Similarly, the previous development concept proposed 86 spaces including 4 accessible spaces which constituted a rate of approximately 1.19 vehicle occupant parking spaces per unit as well as 6 shared spaces including 2 accessible spaces for the visitor and non-residential vehicle parking. The Ontario government's Bill 185 amended the Planning Act to restrict municipalities from mandating parking requirements in Provincial Major Transit Station Areas and around transit stations, except for bicycle parking. Additionally, Transportation Planning have reviewed the submitted application and related materials and have indicated no concerns with the proposed parking rates. Similarly, Accessibility staff have reviewed the submitted application and related materials and have no comments. As a result, planning staff are of the opinion that the proposed parking rates are appropriate for the proposed development.

Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Vehicle Automated Parking	none	none	A required occupant parking space, excluding designated accessible parking, can be provided in an automated parking system.

			iv) each automated parking system parking pallet shall account for two occupant parking spaces and have the following minimum dimensions: a. width of 5.2 m; b. length of 5.2 m; c. area of 27 m2; d. vertical clearance of 1.55 m
Staff Comment: The proposed development provides for 110 vehicle parking spaces of which a total of 84 spaces are proposed as stacked parking at underground parking. Additionally, definitions for the automated parking system have been included as these are not currently regulated under Zoning By-law 2020. Transportation Planning staff have reviewed the proposed amendments for minimum vehicle dimensions and have no concerns.			
Zoning Regulation	**MXC**	**MXC-470**	**H-MXC-565 as amended**
Bicycle Parking	2 spaces plus 1 space/1000m^2 GFA of retail and service commercial	2 spaces plus 1 space/1000m^2 GFA of retail and service commercial	**Apartment Building:** 0.1 short term bicycle parking spaces per unit 0.5 long term bicycle parking spaces per unit **Non-Residential uses:** 2 long term bicycle parking spaces plus 1 space per 1,000m2 GFA 3 short term bicycle parking spaces plus 1 space per 1,000 m2 GFA
Staff Comment: The underlying MXC zone and the existing MXC-470 zone both require 2 spaces plus 1 space per 1000m^2 GFA for Retail and Service Commercial uses. The proposed development includes 457m^2 of retail space, therefore with the current conditions the			

development would require 2 bicycle parking spaces. The proposed development provides for a total of 81 Long-term residential spaces within the underground parking structure of which 70 spaces are provided in a stacked configuration and 11 are provided in a vertical configuration as well as 17 Short-term residential spaces, 3 Commercial Short-term Spaces, and 2 Commercial Long-term Spaces at-grade. This results in the approximate rates provided under the proposed amending by-law. The proposed development provides for additional bicycle parking spaces in comparison to the current zoning. Staff is of the opinion that the proposed amendment is an improvement to the existing conditions. Transportation Planning staff have also reviewed the proposed amendments and have no concerns with the proposed bicycle parking provisions.

As per the analysis above staff is of the opinion that the proposed amendment to Zoning By-law 2020 complies with the general intent of the original zoning amendment and is appropriate for the subject lands.

7.0 Sustainable Building and Development Guidelines

The purpose of the Sustainable Building and Development Guidelines is to encourage sustainable design approaches through Planning Act applications, in keeping with the City's declaration as a sustainable community, and in alignment with Burlington's Strategic Plan 2015-2040. Burlington's Strategic Plan encourages energy efficient buildings and other on-site sustainable features and sets a net carbon neutral goal for the community. Sustainable design is an integrated design process that helps to reduce infrastructure demands and costs, environmental impacts, greenhouse gas emissions, long-term building operating costs, and contributes to the City's goal of being a prosperous, livable and healthy community. The guidelines address sustainability approaches related to site design, transportation, the natural environment, water, energy and emissions, waste and building materials, and maintenance, monitoring, and communication.

In accordance with guideline 2.1, development proposals are required to provide pedestrian and cycling connections from on-site buildings to off-site public sidewalks, pedestrian paths, trails, open space, active transportation pathways, transit stops and adjacent buildings and sites in accordance with Official Plan policies. This guideline helps to encourage active transportation and transit use to reduce the dependence on the automobile. The proposed development provides connection from the proposed private road to off-site public sidewalks that connect to nearby transit stops.

In accordance with guideline 2.3, development proposals are required to provide bicycle parking spaces in accordance with the Zoning By-law and Official Plan policies. This guideline helps ensure that sufficient bicycle parking spaces are provided in order to encourage a variety active transportation. Additionally, guideline 2.5 encourages development proposals to locate occupant/employee bicycle parking near the main

entrance or easy to identify area, in a weather protected area with controlled access or secure enclosures, at no extra charge to the occupant/employee. Similarly, guidelines 2.6 encourages the provision of visitor bicycle parking spaces in a weather protected area at grade near the main entrance or easy to identify area.

In accordance with the Zoning By-law 2020, the underlying MXC zone and the existing MXC-470 zone requires 2 spaces plus 1 space per 1000m^2 GFA for Retail and Service Commercial uses. The proposed development includes 457m^2 of retail space, therefore would require 2 bicycle parking spaces. The proposed development provides for a total of 81 Long-term Residential Spaces within the underground parking structure of which 70 spaces are provided in a stacked configuration and 11 are provided in a vertical configuration as well as 17 Short-term Residential Spaces, 3 Commercial Short-term Spaces, and 2 Commercial Long-term Spaces at at-grade. This results in the approximate rates provided under the proposed amending by-law. Transportation staff have indicated no concerns with the amount of proposed bicycle parking spaces or their location.

In accordance with guideline 2.4, development proposals are encouraged to provide a Transportation Demand Management Plan (TDM) for parking reductions and for Primary, Secondary and Employment Growth areas. This guideline helps to ensure that sustainable modes of transportation are encouraged as TDMs evaluate building transportation needs comprehensively and may consider measures such as the provision of transit passes, flexible work hours, unbundled parking, on site transit facilities, priority parking for carpooling and autoshare programs, etc. Similarly, guideline 2.9 also encourages for residential developments to provide for each unit a one-year Burlington Transit pass at no cost to resident to encourage transit ridership in intensification areas.

Staff note that the following TDM Strategies are being proposed:

- Implementing pedestrian and cycling connections to adjacent streets,
- Providing bicycle parking on site,
- Providing bicycle repair station on site,
- Providing car-share parking and car-share program,
- Undertake a TDM Monitoring Initial survey at 50% occupancy and undertake a TDM Monitoring follow-up survey.

Other TDM strategies are proposed such as providing pre-loaded Presto cards and transit information packages, however, the responsibility to implement is placed on the City or Region of Halton. Transportation Planning indicate that implementation of the proposed TDM measures shall be listed as the Applicant's responsibility. Additionally, further details such as reasoning for conducting a TDM monitoring survey at 50% occupancy rather than full occupancy, shall be included at Site Plan application. Additional measures such as unbundled parking, which provides occupants the opportunity to opt out of having an assigned parking space, and fee-based parking areas should be considered. These additional measures will assist in changing travel behaviour and reduce the demand for parking. These recommendations may be addressed at the Site Plan application stage.

In accordance with guideline 3.8, development proposals are encouraged to maintain existing on-site trees that are 30 cm or more DBH (diameter at breast height) or Maintain 75 per cent of healthy mature trees greater than 20 cm DBH. Tree preservation requirements are to be determined by Official Plan urban forestry policies. As part of the application submission, the applicant provided an Arborist Report, Tree Protection Plan and Landscape Concept Plans as part of the formal application submission. Urban Forestry and Landscaping staff indicated concerns with the removal of tree number 2 as shown on the submitted plans, the applicant therefore provided Revised Tree Protection Plan and Landscape Concept Plan to now show that tree number 2 will be preserved. Additionally, tree number 15 and 20 will also be preserved, these are located in close proximity to the rear property line.

In accordance with guideline 4.1, development proposals are required to achieve a level one/enhanced stormwater treatment for all stormwater runoff. This guideline helps to ensure stormwater quality treatment reduces the total suspended solids in runoff to ensure the protection of receiving watercourses and Lake Ontario. Similarly, in accordance with guideline 4.3, development proposals are encouraged to minimize impervious surfaces and stormwater runoff with Low Impact Development (LID) measures, such as:

- permable pavements;
- bioswales;
- infiltration trenches/bioretention areas;
- rain gardens;
- draining roofs to pervious areas, and;
- other innovative stormwater management strategies

This guideline helps to ensure Low Impact Development strategies mitigate the impacts of increased urban runoff and stormwater pollution by managing it as close to its source as possible. It comprises a set of site design approaches and small scale stormwater management practices that promote the use of natural systems for infiltration and evapotranspiration, and rainwater harvesting. As part of the application submission, the applicant provided a Functional Servicing and Storm Water Management Report to acknowledge a level one enhanced stormwater treatment for all stormwater runoff. Development Engineering staff reviewed the submitted materials and did not indicate concerns with the proposed Storm Water Management. The proposed development includes multiple green roofs including one on the roof of the underground parking exit and entrance ramp as well as on the rooftop amenity space to aid in stormwater retention.

In accordance with guideline 5.1, development proposals are required to provide vegetated landscape areas in hard surface areas as per the Zoning By-law. This guideline helps to provide vegetation that can reduce the urban heat island effect to improve human comfort and energy efficiency in the surroucnding areas. The proposed development provides for green roofs as previously mentioned as well as landscape areas which help to the reduce potential urban heat island effects including landscaping along plains Road

East and Cooke Boulevard as well as at the rear of the site along the at-grade parking spaces.

In accordance with guideline 6.1, development proposals are required to provide and implement a waste management plan in accordance with Regional requirements as recycling and composting treats waste as a resource and reduces the need for landfill expansion. Halton Region staff have reviewed the submitted materials and have not indicated concerns with the proposed development and associated waste management. Nonetheless, a Waste Management Plan is required to address waste collection for the proposed development. The applicant is to reference the Region's Development Design Guidelines for Source Separation of Solid Waste for site design requirements/dimensions. The residential portion of this development may be eligible for Halton Region Waste Collection, providing it meets the requirements set out in the Guidelines.

Staff is of the opinion the proposed development proposal meets the intent of the required Sustainable Building and Development Guidelines, therefore the development considers the City of Burlington Climate Action Plan to support the City's climate implications.

8.0 Shadow Study Guidelines and Terms of Reference (2020)

The purpose of the Shadow Study Guidelines is to provide a best practices approach to Shadow Studies in order to promote high-quality development proposals that ensure adequate access to sunlight is maintained for the enjoyment of public and private spaces alike throughout the City. The Shadow Study Guidelines indicate that a Shadow Study is required for development proposals with building heights of 5-storeys or more and in some cases when additional building height is requested and when a proposal is in close proximity to shadow sensitive uses, a Shadow study was therefore submitted with the subject applications.

In accordance with Section 4.3, to maximize the usability of private outdoor amenity areas such as rear yards, decks, and (rooftop) patios, including common outdoor amenity areas, shadows from proposed developments should not exceed 2 hours in duration, between 09:00 and 18:00 on March 21st. Additionally, the criterion is met if the Sun Access Factor is at least 0.22 on the test date. A test date of March 21st was analyzed for shadow impact on private outdoor amenity spaces generated by the proposed development onto surrounding properties through the submitted Shadow Study. It was observed that from 3 pm to 6 pm, shadows were cast on the planned development at 53 Plains Road East along its east elevation which abuts Cooke Boulevard. The approved development concept at 53 Plains Road East has not yet been constructed, and the estimated shadows are expected to cast on a minor portion of its built envelope which would include for some private amenity areas. Similarly, a 0.26 sun access factor has been indicated for the test date. Planning staff are of the opinion that the shadow impacts to the private outdoor amenity areas are minor due to the duration and locations of the cast and overall meet the Shadow Study criteria.

In accordance with Section 4.4, shadows cast by all existing buildings and proposed developments onto lands designated or used for Parks and Open Spaces must allow for either: full sunlight 50 per cent of the time or 50 per cent sun coverage at all times during March 21st (09:00 to 18:00), September 21st (9:00 to 18:00), and December 21st (11:00 to 15:00). These test dates were analyzed under the submitted Shadow Study for shadow impact on private outdoor amenity spaces by the proposed development. Given no parks or open spaces are located within the test area, or area within the shadow catchment of the proposal, no parks or open spaces are shown to be affected.

In accordance with Section 4.5, shadows cast by all existing buildings and proposed developments onto places where children play including but not limited to school yards, playgrounds, and park features such as wading pools or other outdoor shadow-sensitive activity areas as identified by the City of Burlington, must allow for either full sunlight 50 per cent of the time or 50 per cent sun coverage at all times during March 21st (09:00 to 18:00) and September 21st (09:00 to 18:00) as well as December 21st (11:00 to 15:00) for school yards and playground areas only. The subject lands do not include any of these types of areas within the near vicinity, this section does not apply to the analysis.

In accordance with Section 4.6, shadows cast by all existing buildings and proposed developments onto the full extents of the boulevard and sidewalk on the opposite side of the adjacent right-of-way, must allow for either full sunlight 50 per cent of the time or 50 per cent sun coverage at all times between 09:00 and 18:00 on March 21st. Additionally, the criterion is met if the Sun Access Factor is at least 0.50 on the test date. As per the submitted Shadow Study, shadows begin to be cast on a small portion of the opposite side boulevard along Cooke Boulevard on March 21st at 1:00 pm. The shadows move gradually in a clockwise direction, as a result, from 1:00 pm to 6:00 pm, shadows are cast on the sidewalk on either side of Cooke Boulevard. Although this results in a Sun Access Factor is 0.26 which is approximately 24% lower than the required minimum 0.50, majority of the shadows casted on the opposite boulevard and included in the Sun Access Factor calculations through the times of 9:00 to 12:00 pertain to shadows produced by surrounding neighbouring buildings. Additionally, the proposed development and amending by-law consider building massing design strategies such as setbacks and stepbacks at specific storeys of the building to mitigate the impact of shadows.

Staff are therefore of the opinion that the proposed development continues to maintain the purpose and intent of the Shadow Study Guidelines.

9.0 Pedestrian Level Wind Study Guidelines and Terms of Reference (2020)

Pedestrian Level Wind Studies ('Wind Study') are conducted to predict and assess the wind impacts of proposed buildings and site designs on surrounding public and private spaces in addition to on-site wind conditions to ensure pedestrian comfort and safety is maintained. In accordance with Section 2.1 of the guidelines, a development of 12-storeys or more is required to submit a Quantitative Wins Assessment ('Wind Tunnel Test'). Given

the proposed development consisted of a 13-storey mid-rise building, the applicant was required to submit a 'Wind Tunnel Test'.

In accordance with Section 4.2 of the guidelines, the study defines five comfort categories with a Gust Equivalent Mean (GEM) wind speed for each as follows:

1. Sitting –wind speed below 10 km/h (i.e. 0 – 10 km/h) would be considered acceptable for sedentary activities, including sitting.
2. Standing – wind speed below 14 km/h (i.e. 10 km/h – 14 km/h) is acceptable for activities such as standing.
3. Leisurely Walking (Strolling) – wind speed below 17 km/h (i.e. 14 km/h – 17 km/h) is acceptable for activities such as strolling.
4. Fast Walking (Walking)– wind speed below 20 km/h (i.e. 17 km/h – 20 km/h) is acceptable for walking or more vigorous activities.
5. Uncomfortable – wind speed over 20 km/h is classified as uncomfortable from a pedestrian comfort standpoint. Brisk walking and exercise, such as jogging, would be acceptable for moderate excesses of this criterion.

The GEM should be evaluated as a comparison between the existing wind condition and the wind condition resulting from the proposed development. A criterion is met if the predicted wind speeds and frequencies occur at least four out of five days below the respective threshold.

The submitted Wind study identifies that out of the five comfort categories, most public sidewalks, walkways, driveways, landscaped spaces, and parking areas within and surrounding the proposed development will experience wind conditions suitable for walking or better throughout the year. Exceptions include an isolated sidewalk portion along Plains Road East, driveway and walkway portions at the future development on 1026 Cooke Boulevard, and on the north side of the study site, which exceed the walking criterion during the winter months yet the exceedances of the walking criterion are generally marginal (< 2km/h), restricted to the winter months, and all wind speeds remain safe.

The residential lobby and all retail entrances will be suitable for standing or better throughout the year. All secondary building access points (including vehicular entrances, building exits, and loading areas) will generally be suitable for walking or better on a seasonal basis. Exceptions include the stairwell exit and portion of loading area near the rear corner of the building where wind conditions will be uncomfortable during the winter. Similarly, the rooftop outdoor amenity will experience a mix of sitting and standing wind conditions during the summer months, with standing conditions at the central portion to the east. If sitting conditions are desired in these areas, the study suggested to raise the proposed amenity fencing, as delineated in the architectural plan, to at least 2.0 metres above the walking surface along the east perimeter of the amenity and staggered windscreens along the walkway to buffer winds accelerating around the building corner. The parking ramp was revised to an enclosed structure to mitigate the wind entering the

site from the west and a windscreen on the rooftop amenity of 2.0m tall windscreen has been added.

Staff are therefore of the opinion that the proposed development continues to maintain the purpose and intent of the Pedestrian Level Wind Study Guidelines and Terms of Reference.

10.0 Design Guidelines for Mixed-Use and Residential Mid-Rise Buildings (2019)

The City of Burlington Design Guidelines for Mixed-Use and Residential Mid-Rise Buildings are applicable across the City, wherever mid-rise building forms are permitted by the Official Plan and Zoning Bylaw (with the exception of Employment Lands), and for the purposes of the guidelines, include any buildings between 5- to 11-storeys in height.

The guidelines are grouped by the main components of a mid-rise building, including the Lower and Upper building. The Lower building represents the first few storeys, including the ground floor and any additional floors with direct relationship to the street and public realm. Generally, this would include those storeys forming the streetwall and not those stepped back from the streetwall. The Upper building is that portion of a mid-rise building above the Lower building, designed to fit with and achieve an appropriate relationship with the Lower building, the public realm, and neighbouring properties. Additionally, all street facing building façades should be divided into three horizontal parts: a bottom, middle, and top to organize a complete façade expression and be arranged in a way that ensures harmonious proportion.

2.1 Building Placement

1. *In general, buildings should be placed parallel to streets or public open spaces (within or along the edge of the site) to frame and define these spaces. This will also increase the amount of private open space behind the building and separation from neighbouring properties.*
2. *Consider the building's orientation to maximize south-facing walls for optimal access to sunlight to habitable rooms and other environmental benefits such as energy conservation, solar access to open spaces or areas for stormwater management and planting.*
3. *Placement should consider existing site conditions and look to retain and enhance certain features as assets such as mature trees and topography.*
6. *Where there is no consistent pattern of street setbacks, the building should be set back to create a boulevard that can accommodate wider sidewalks, street trees, landscaping, and active uses to establish a more pedestrian oriented relationship between the building and the sidewalk. On streets where commercial or retail uses are required at the ground floor level, a minimum 6.0 metre boulevard is preferred, except where existing conditions preclude. The intent is that a road widening will not be required to specifically achieve this guideline.*

8. *On corner sites, the building should frame both streets. The placement of corner buildings may be subject to a daylight triangle.*
9. *All buildings should have a public front ('face') and private back. Buildings should not expose their back onto the front of a neighbouring building to minimize impacts such as "back of house" activities on adjacent properties.*

The subject lands are located at the corner of Plains Road East and Cooke Boulevard, the lower portion of the building fronts parallel onto both these streets which provides for a public front and private back as well as appropriate separation to the side and rear yards of neighbouring buildings. Additionally, a daylight triangle of 5m by 5m is also included from the previous development proposal along the corner of Plains Road East and Cooke Boulevard.

Although a continuous streetwall has not been established on Plains Road East and Cooke Boulevard, a continuous streetwall is desirable along these streets as they are intended to provide for continuous ground floor retail and service commercial uses. The proposed development contemplates a 3.6m setback for the first storey abutting Plains Road East and a 3.5m setback for the first storey abutting Cooke Boulevard which meets the proposedand envisioned neighbouring setbacks. This has been included under the amending by-law as a minimum required setback of 3m and maximum permitted setback of 3.5m along both Plains Road East and Cooke Boulevard with minor reductions to the proposed stair enclosures. Additionally, the proposed development also provides for an approximately 6m wide sidewalk from the street curb to the property line abutting Plains Road East and an approximately 2m wide sidewalk along Cooke Boulevard. Therefore, the proposed development provides for a total boulevard width of approximately 9.6m along Plains Road East and approximately 5.5m along Cooke Boulevard. The boulevard is intended to accommodate pedestrians, street trees and landscaping, and active at-grade uses.

2.2 Building Separation & Spacing

1. *In general, taller buildings should provide greater separation distances. Separation distances should generally range between 15.0-20.0 metres.*
2. *Where windows are proposed within the lower building, a minimum separation distance of 15.0 metres should be provided between adjacent buildings.*
3. *Where a continuous streetwall is desirable, side-yard setbacks are usually not required. Continuous streetwalls are generally desirable within areas designated for mixed use, except where special site or block conditions require breaks to access mid-block connections, public courtyards, or other open spaces.*
5. *Where there is a transition between a mid-rise development and a tall building, a minimum separation distance of 20.0 metres should be provided between the*

tower component of a tall building and the nearest part of the mid-rise building to minimize overlook and shadowing and pedestrian level wind impacts.

The proposed development is generally a taller mid-rise building and includes windows and balconies on all elevations. The subject lands directly abut the property 1026 Cooke Boulevard to the rear yard which currently contains a 1-storey commercial building yet it has received development approvals for a 24-storey mixed use building with a tower portion to be located approximately 12m away from the subject lands' rear yard. The combined setback between the approved tower for 1026 Cooke Boulevard and the proposed lower building portion is approximately 18m. The proposed development on the subject lands also includes balconies on the 2nd to 6th storeys with a 1.65m projection into the rear yard. The intent of a 20m separation distance between neighbouring buildings with windows is to protect for privacy within residential units and discourage overlook. As previously mentioned, although a continuous streetwall has not been established on Plains Road East and Cooke Boulevard, it would still be desirable. Staff is of the opinion that although the proposed development includes a combined separation between podiums of approximately 18m and a 1.65m projecting balcony, the proposed development provides for appropriate distance to mitigate privacy concerns and maintain a continous streetwall.

Similarly, the subject lands also directly abut property 15 Plains Road East to the south side yard which contains a 1-storey service commercial building that is approximately 50m away from the subject lands south side yard property line. This property is zoned as MXE under the Zoning By-law, designated as 'Mixed Use Corridor – Employment' under the in effect Official Plan and it is located within the 'Aldershot Main Street' precinct under the proposed Aldershot GO Major Transit Station Area (MTSA). As a result, this property is envisioned to contain mid-rise buildings with heights of up to 11 storeys. The existing zone of the subject lands (zone MXC-470) permits for a 0m setback to the south side yard, the proposed podium includes an increased setback of 8m to the south side yard and 1.2m to south side yard specifically within 24 m of Plains Road East. Staff is of the opinion that the proposed setback would encourage a continuous streetwall in close proximity to Plains Road.

2.3 Built Form: Height & Massing

1. *When deciding on lower building height and massing consider the following:*
    - *the permitted minimum and maximum heights set out in the Official Plan and Zoning By-law;*
    - *the physical character of the surrounding area including the height and scale of adjacent buildings and the immediate streetscape;*
    - *the views into, out of, and through the site;*

- *the potential shadowing impacts on neighbouring properties and adjacent public spaces – taller elements should be arranged accordingly;*
- *the micro-climate (particularly pedestrian level wind impacts created by wind); and*
- *the relationship of the building height to building depth and lot width. Use site characteristics such as width (narrow or wide), depth (deep or shallow) and number of frontages to inform an appropriate built form*

2. *Design buildings so that the massing reinforces the street edge.*
3. *In general, a building's form should reflect the existing and planned context in terms of street character (including the planned street function and right-of-way width), land use, and built form.*
4. *Where a streetwall is established, the lower building height and upper building step-backs should reinforce the existing streetwall to create a consistent streetscape.*
5. *Where a streetwall is not established, the streetwall for new mid-rise buildings should be limited to a height of 80% of the street width (up to a maximum of 6-storeys) with additional storeys stepping-back a minimum of 3 metres above the streetwall to maintain a humanscale and minimize shadowing. On streets with a planned right-of-way width of 26 metres or more, new mid-rise buildings up to 6-storeys do not require an upper building step-back.*

As previously mentioned, Plains Road East and Cooke Boulevard do not currently have an established streetwall. Similarly, Plains Road East has a deemed width right-of-way of 36m and Cooke Boulevard has a deemed width right-of-way width of 20 metres. Therefore, the maximum building height of the lower portion or podium along Plains Road East should be approximately 28.8m and along Cooke Boulevard approximately 16m. Plains Road East is intended to host mix use buildings with mid-rise built forms with gradually taller buildings towards the Aldershot GO station. The intent of regulating maximum heights for the lower portion of mid-rise buildings is to achieve human scale and pedestrian feel along the streetscape.

The proposed lower building portion or podium ranges from 6- to 8-storeys in height (22m to 28.6m measured from fixed grade) to provide for building design articulation. The podium is proposed to be 6-storeys (22m) in height along the rear yard and south side yards to complement the height of the planned and envisioned built form of the adjacent properties, including 15 Plains Road East and 1026 Coke Boulevard. The podium is proposed to be 8-storeys (28.6m) in height along the building's main residential entrance on Cooke Boulevard near the corner of Plains Road East and Cooke Boulevard which designates the main residential entrance and street corner as a main focal point. Additionally, the two separate retail spaces at grade will include multiple pedestrian entrances to each along Plains Road East and Cooke Boulevard.

As previously discussed, the proposed development is in accordance with the Shadow Study Guidelines and Terms of Reference as well as the Pedestrian Level Wind Study Guidelines and Terms of References which consider the size of shadows and wind impact onsite and onto the surrounding streetscape.

As a result, staff is of the opinion that the proposed height and massing of the lower building portion is appropriate and continues to meet the intent of the mentioned guidelines.

6. *In general, the building should not exceed a length of 60.0 metres apart from L-shaped building forms.*
7. *Pushing (projecting) and pulling (recessing) building volumes from the main building form is encouraged to help break down the mass of larger buildings.*
8. *Balconies are encouraged and should be integrated into the building design and massing with inset or Juliette balconies. Projecting balconies should not be within the streetwall to avoid negative impacts to the public realm including additional building massing and shadowing.*
10. *Stepping back upper level building volumes is encouraged to assist with transitions between neighbouring buildings with lower heights.*

The proposed development is less than 60m in length on all elevations. The proposed lower portion of the building is stepped back at different levels between the 6- and 8-storeys to accommodate for private outdoor amenity area. These include setbacks from the building wall of the storey below of at approximately 2m abutting Cooke Boulevard,1.8m abutting Plains Road East, 4.2m abutting the rear yard, and 2m abutting the south side yard. Additionally, this has been included under the amending by-law by way of setbacks to all exterior walls of the podium to the exterior walls of the upper building portion or tower. Additionally, projecting balconies are only proposed along the upper sections of the building and are within the lower building wall setbacks so these do not project into the streetwall. The proposed podium only contains balconies which are inset into the building wall, a regulation which prohibits balconies to encroach into the yards has also been incorporated as part of the amending by-law. Staff is of the opinion that the proposed development continues to meet the intent of the mentioned guidelines.

12. *The height and massing of the building should ensure a minimum of five hours of consecutive sunlight on the sidewalk across the street at the spring and fall equinoxes (approximately March 21 and September 21, respectively).*

As previously discussed, the proposed development meets the intent of the Shadow Study Guidelines and Terms of Reference as discussed under this analysis.

2.4 Street Level Design, Façade Articulation & Materials

2. *Where ground floor commercial / retail uses are required, the ground floor should be a minimum floor-to-floor height of 4.5 metres to accommodate internal servicing and loading areas, and active uses.*
8. *Use architectural elements and expressions such as canopies, doors, windows, lively colours and the highest quality materials at street level to highlight individual units, differentiate between residential and nonresidential entrances in mixed-use buildings, and engage the street.*
9. *Design the main entrance to be clearly distinguishable from other entrances through its architectural design and treatment, high visibility, wayfinding and direct pedestrian access.*
10. *Ensure that all main entrances are barrier free from the public sidewalk and on-site parking areas. Level access is preferred, where possible.*
11. *Emphasize grade-related entrances with high quality landscape design.*
14. *The main building entrance should be designed to be pedestrian- and cycle-friendly with convenient, well-lit, and safe access. The main entrance should also provide for shelter from wind and rain through well integrated weather protection elements such as canopies, extended eaves and overhangs. Canopies should be located above the ground floor and provide a width of at least 1.5 metres.*
15. *The location of building entrances should consider the location of adjacent transit stops.*
16. *On corner sites, the main entrance should be located at the corner. Where this is not possible, the building should address the street corner, both streets, and prioritize the primary street for the main pedestrian access.*

The proposed podium includes structural overhangs on the first storey because of the setbacks of the storeys above. The first storey includes a minimum building height of 6m which has been maintained under the amending by-law. The proposed development contemplates a 3.6m setback for the first storey abutting the property line along Plains Road East and a 3.5m setback for the first storey abutting the property line along Cooke Boulevard. This has been included under the amending by-law as a minimum setback of 3m and maximum setback of 3.5m along both Plains Road East and Cooke Boulevard with minor reductions to the stair enclosures. Differently, the second storey for both the Plains Road East and Cooke Boulevard building elevations projects approximately 1.8m into each respective yard which would allow for a building overhang for weather protective design at grade and additional landscaping.

The proposed podium includes a maximum height of 8-storeys (28.6m) along the building's main residential entrance on Cooke Boulevard near the corner of Plains Road East and Cooke Boulevard which designates the main residential entrance and street corner as a main focal point. Additionally, the main residential entrance of the building along Cooke Boulevard is proposed to include different use of materials to differentiate

from the multiple retail entrances along Plains Road East and Cooke Boulevard. Architectural elements such as a recessed and taller first storey in comparison to the storeys above, doors and floor to ceiling windows as well as landscaping at grade is proposed. Staff is of the opinion that the proposed development continues to meet the intent of the mentioned guidelines.

2.5 Site Design, Open Space & Streetscaping

1. *All access points to the site should be located and designed to respond to the street and existing mobility networks beyond the site.*
2. *Pedestrian access should always be prioritized for the safety and enjoyment of residents and visitors.*
3. *Reduce the number and width of vehicle access points to avoid conflicts between pedestrian and vehicle traffic.*
4. *Access to parking, servicing and loading should be provided at the rear of the building, or a laneway if possible. On corner sites, access should be provided from secondary streets provided the entrance facilities are well integrated into the rest of the frontage.*
6. *Servicing and loading should be accommodated internally within the building.*
7. *Limit the extent of site area dedicated to servicing by using shared infrastructure and efficient layouts.*

The ground level will reflect two separate retail spaces with multiple pedestrian entrances to each along Plains Road East and Cooke Boulevard, while residents and visitors have access to the residential uses along the main building entrance on Cooke Boulevard and at the rear in close proximity to the at grade parking. The proposed at grade parking, underground parking access ramp, servicing and loading dock at the rear of the site is proposed to be screened from both Plains Road East and Cooke Boulevard by the proposed podium. Access to these has been proposed via a drive aisle located along the rear of the site on Cooke Boulevard. Staff is of the opinion that the proposed development continues to meet the intent of the mentioned guidelines.

9. *Most on-site parking should be provided underground. In general underground or structured parking is encouraged before surface parking.*
10. *Where parking is provided within an above ground structure, it should be wrapped with retail / commercial or residential units along the street frontage.*
11. *Surface parking should be limited to visitor and retail / commercial parking and located at the rear of the building to be hidden from public view. Whenever possible, provide visitor parking in a convenient underground parking area adjacent to an elevator.*
13. *Any surface parking areas visible from the street should be buffered and screened with high quality architectural elements, setbacks or landscaping. On larger sites*

with surface parking areas, incorporate landscaped islands and high-quality landscaping to create comfortable and safe pedestrian walkways and amenity areas.

14. *Provide for safe pedestrian and cyclist access to underground parking by using clearly visible, well-lit, convenient, and easily accessible access points from the street. Signage should indicate the barrier free path of travel.*

All residential parking is proposed underground while visitor and retail parking is proposed at grade at the rear of the site. The proposed at grade parking, underground parking access ramp, servicing and loading dock at the rear of the site is proposed to be screened from both Plains Road East and Cooke Boulevard by the proposed podium. Staff is of the opinion that the proposed development continues to meet the intent of the mentioned guidelines.

18. *Common outdoor amenity areas should be located next to interior amenity facilities with direct physical and visual access between these spaces through doors and windows.*
19. *All common outdoor amenity areas should apply the principles of universal design and must comply with the City's Accessible Design Standards.*
20. *The roof of a lower building can be landscaped and used as common and private outdoor amenity area for the residents of a development. Where possible utilize building rooftops as green roofs and/or usable private and shared outdoor amenity areas such as gardens.*
21. *Locate private outdoor amenity areas for family-sized units so that they have views and access to outdoor play areas, where possible.*

The proposed development includes indoor and outdoor amenity space, green roof infrastructure and landscaping at the rooftop. As previously mentioned, the proposed lower portion of the building is stepped back at different levels between the 6- and 8-storeys to accommodate for private outdoor amenity area. The City's Accessibility staff have reviewed the development applications and related materials and have not indicated concerns with the proposed amenity spaces. Staff is of the opinion that the proposed development continues to meet the intent of the mentioned guidelines.

3.1 Built Form: Transitions

1. *When deciding on overall and upper building height and massing consider the following:*
   - *the permitted minimum and maximum heights set out in the Official Plan and Zoning By-law;*
   - *the physical character of the surrounding area including the height and scale of adjacent buildings; and*

- *the potential shadowing and pedestrian level wind impacts on neighbouring properties and private and public open spaces – taller elements should be arranged accordingly.*

2. *Where the building fronts a street, step-back the upper floors a minimum of 3.0 metres above the streetwall to protect access to sunlight and sky view for streets while limiting shadowing. An additional step-back should be considered for buildings taller than seven (7) storeys in height. This additional step-back may be a minimum of 1.5 metres.*
3. *Above the streetwall, or the sixth storey for taller buildings, a minimum building separation distance of 20.0 metres should be provided to reduce impacts such as overlook and shadowing.*
4. *Design the upper building to clearly distinguish it from the lower building and to further reduce the upper level building massing. This should include step-backs, colour and material variations, and unique articulation.*
5. *The design and placement of upper storeys should be carefully considered to minimize the size of shadows on neighbouring properties. A shadow study should be provided with mid-rise building applications in compliance with the Shadow Study Guidelines and Terms of Reference.*

As previously mentioned, staff is of the opinion that the proposed development meets the intent of the Zoning By-law and Official Plan as well as provides for appropriate distance to mitigate overlook as well as wind and shadow impacts through the implementation of appropriate setbacks and setbacks.

Upper Façade / Roof Design, Articulation & Materials

3. *Use architectural elements and expressions such as balconies, windows, and recesses and projections to highlight individual units and reinforce a variety of scales and textures within each component of the building.*
4. *Balconies are encouraged within the upper building to provide private outdoor amenity areas and additional articulation. They may be inset or project but should have a minimum depth of 1.5 metres to provide functional space. Generally, balconies should be sized according to the number of residents the unit is intended to house.*
5. *Balconies and other projections should be contained within all angular planes and setbacks and shall not protrude into the public realm (over sidewalks).*

Balconies are proposed within the upper building portion to provide for private amenity area to the residentials units. These project more than 1.5m into the yard and do not encroach into the setback of the lower building portion. The proposed balconies are contained within the angular planes that abut the public realm. Staff is of the opinion that the proposed development continues to meet the intent of the mentioned guidelines.

6. *Design the building top to clearly distinguish it from the lower portions and to further reduce the building massing. This should include additional physical building setbacks, stepbacks, colour and material variations, and unique articulation.*
7. *Building tops and mechanical equipment should be designed to integrate with the overall architectural expression of the building.*
8. *Where possible, rooftop amenity areas are recommended to create activity at the upper storeys of the building and be appropriately set back from the roof edge.*
10. *Rooftop mechanical equipment should be architecturally screened from public view to protect or enhance views from other buildings and the public realm.*
11. *Where possible, rooftop mechanical equipment should be wrapped by residential units, or other occupiable space such as outdoor amenity areas.*
12. *Rooftop mechanical equipment should be set back, on all sides, no less than 3.0 metres from the edge of the floor below, and where an angular plane applies, fit within all angular planes.*

The proposed development includes a 13th storey for the mechanical equipment rooms and access to the outdoor amenity area which is wrapped around the 13th storey. The building portion of the 13th storey is stepback no less than 3.0 metres from the edge of the floor below along yards abutting Plains Road, Cooke Boulevard, the rear property line, and the south side yard except for a section of the south side yard that is approximately 8m away from south side yard property line. These measurements have been included under the amending by-law. Staff is of the opinion that the proposed development continues to meet the intent of the mentioned guidelines.

As per the analysis provided, staff is of the opinion the proposed development proposal meets the overall objectives and guidelines of the Design Guidelines for Mixed-Use and Residential Mid-Rise Buildings.

11.0 Plains Road Corridor Urban Design Guidelines (2006)

The purpose of the Plains Road Corridor Urban Design Study is to refine the vision that the Plains Road Village Vision had been advocating and to create design guidelines to assist the City to direct future redevelopment of the roadway and adjacent lands. Plains Road has evolved from its original function as a toll road, to a Provincial Highway, to its present role as a municipal major arterial road.

The subject property is located within the Shadeland District which is defined as the segment of the Plains Road corridor between Cooke Boulevard and Filmandale Road. This District is characterized by an eclectic mix of land uses on the north side of the corridor and primarily residential and home office uses on the south side. Urban design objective should concentrate on consolidating and infilling commercial/industrial uses and preserving and enhancing the residential and home commercial uses. Mature boulevard shad trees and existing landscaping along the corridor should be protected. The underutilized sites at Cooke Boulevards and Plains Road could be redeveloped to provide

an improved gateway/entry point to the industrial park. Redevelopment should capitalize on the attractive landscaping along Cooke Boulevard. At-grade parking along the frontage of commercial properties should be screened with low growing vegetation to improve the appearance of the corridor.

The proposed development provides for a mix of uses including 457m^2 of ground floor retail as well as 161 residential units in the storeys above, this reflects an increase of 89 residential units and 232 m^2 of ground floor retail space in comparison to the previously approved development. The two existing mature trees on site and along the south lot line along the boulevard of Plains Road East were initially proposed to be removed, at this time the applicant has committed to preserve one of the trees, that being tree number 2 as shown on the submitted revised Tree Protection Plan and Landscape Concept Plan. Overall, Planning Staff are of the opinion that the proposal along with the Holding provision meets the objectives and intent of the Plains Road Design Guidelines (2006).

Recommendation Report Summary

SUBJECT: Statutory Public Meeting and Recommendation Report for a Zoning By-law Amendment for 1510 and 1515 North Service Road and 2202-2208 Industrial Street

TO: Committee of the Whole

FROM: Development and Growth Management

Community Planning

Report Number: DGM-52-25

Wards Affected: Ward 3

Date to Committee: July 8, 2025

Date to Council: July 15, 2025

Recommendation

Approve the application for a Zoning By-law Amendment as modified by staff in development and growth management report DGM-52-25, to add one Convenience/Specialty Food Store and add Recreational Establishments to the CE-33 and CE-34 zones, and add Restaurant Uses and Veterinary Services to the CE-33 zone; and

Approve Zoning By-law 2020.508 attached as Appendix D to development and growth management report DGM-52-25, to amend the “CE-33” and “CE-34” zoning of the lands at 1510 and 1515 North Service Road and 2202-2208 Industrial Street; and

Deem that Zoning By-law 2020.508 conforms to the Halton Region Official Plan, the 1997 Official Plan of the City of Burlington and the 2020 Official Plan and that there are no applications to alter the Official Plans with respect to the subject lands.

Executive Summary

Purpose of report:

- To provide a recommendation related to a Zoning By-law Amendment application to add one Convenience/Specialty Food Store with a maximum floor area of 1800 square metres to each zone; add Automotive Uses to the CE-33 zone; add Recreational Establishments

to the CE-33 and CE-34 zones; add Restaurant Uses to the CE-33 zone; and, Veterinary Services to the CE-33 zone. Staff are recommending modified approval of the Zoning By-law amendment application with a holding provision for the Recreation Establishment use. The modified approval also includes refusing to remove the Automotive Uses from the prohibited list in CE-33.

Key findings:

- The applicant has applied for Zoning By-law Amendments to add the following uses to the CE-33 and CE-34 zones:
    - To amend each zoning exception to permit one convenience/specialty food store with a maximum floor area of 1800m2 in each zone
    - To remove Veterinary Services from the prohibited list in the CE-33 Zone
    - To remove Recreational Establishments from the prohibited list in the CE-33 and CE-34 Zone.
    - To remove Automotive uses from the prohibited list in the CE-33 Zone
    - To remove all restaurant uses (convenience, standard, fast food) from prohibited list in CE-33 zone
    - Implement a Holding to require a record of site condition for a Recreational Establishment use only.
- Staff are recommending approval with modifications and holding provision of the proposed Zoning By-law Amendments to add one Convenience/Specialty Food Store, Veterinary Services, Restaurants, and Recreational Establishments subject to a holding provision, and not allow Automotive Uses based on the following:
    - The proposed amendments are consistent with the Provincial Planning Statement (2024);
    - The proposed amendments conform with the Regional Official Plan (2009, as amended) and conform to the Burlington Official Plan (1997) and Burlington Official Plan (2020);
    - The proposed amendments maintain the general intent and purpose of Zoning By-law 2020;
    - Staff is of the opinion that the proposed amendments represent good planning.

Background

On May 2, 2025, the City acknowledged that a complete application had been received for a Zoning By-law Amendment for the properties known municipally as 1510 and 1515 North Service Road and 2202-2208 Industrial Street. The City has accepted one application for the four sites as the rezoning is being considered comprehensively. The purpose of this application is to amend the existing site-specific CE-33 and CE-34 zoning to add the following uses to the CE-33 and CE-34 zones:

- To amend each zoning exception to permit one convenience/specialty food store with a maximum floor area of 1800m2 in each zone.
- To remove Veterinary Services from the prohibited list in the CE-33 Zone
- To remove Recreational Establishments from the prohibited list in the CE-33 and CE-34 Zone.
- To remove Automotive uses from the prohibited list in the CE-33 Zone
- To remove all restaurant uses (convenience, standard, fast food) from prohibited list in CE-33 zoneImplement a Holding to require a record of site condition for a Recreational Establishment use only.

Planning Staff are recommending approval with modifications and holding provision of the proposed Zoning By-law Amendments to add one Convenience/Specialty Food Store, Veterinary Services, Restaurants, and Recreational Establishments subject to a holding provision, and not allow Automotive Uses.

Site History:

The existing multi-unit commercial buildings were built on previously vacant land in 2003-4 after the following approvals were granted in 2001: Official Plan amendment (505-04/00), rezoning (520-22/00), and site plan (535-44/01). 1510 North Service Road was the first phase of a three-phase commercial development. 1515 North Service Road and 2200-2208 Industrial Street were developed in subsequent phases. Standard Restaurant was added as a use to the properties in 2016 through an additional rezoning (520-07/15).

Site Description:

The proposal consists of 4 properties at the intersection of Industrial Street and North Service Road. 1510 North Service Road (1.617 ha) is located northwest of the intersection, 1515 North Service Road (1.11555 ha) is located southwest of the intersection and 2202-2208 Industrial Street (2.58 ha) is located northeast of the intersection.

Surrounding uses are as follows:

- North: Low-density residential neighbourhoods, primarily consisting of single-detached homes, organized in a suburban grid layout. Roly Bird Park, which serves as a key public recreational space.
- East: Employment lands, including warehouses, office spaces, commercial buildings and other employment businesses. Utility and rail corridors and stormwater management areas.
- South: The QEW (Queen Elizabeth Way), a major provincial highway that facilitates regional connectivity. Additional commercial and industrial uses, including large-scale retail plazas and some residential.
- West: Commercial plazas, including retail businesses, restaurants, and service-oriented establishments. Proximity to Brant Street, a key arterial road providing local access to Burlington's core.

Burlington GO Station is approximately 2.5 km away travelling along Brant Street. The closest bus routes (2, 12) are located at the intersection of Brant Street and North Service Road approximately 500 metres from 1510 and 1515 North Service Road.

Analysis

Policy Framework

The proposed Zoning By-law Amendment application is subject to review in accordance with the Provincial Planning Statement (2024); Region of Halton Official Plan (2009, as amended); City of Burlington Official Plan (1997, as amended); City of Burlington Official Plan (2020, as amended); and City of Burlington Zoning By-law 2020, as summarized below and in greater detail within Appendix E.

Planning Staff are of the opinion that the proposed application as modified by staff is consistent with the Provincial Planning Statement (2024) conforms with the Region of Halton Official Plan (2009, as amended), and the City of Burlington Official Plans (1997 as amended & 2020 as amended).

Employment Commercial Function

The proposal requests a Zoning By-law Amendment to add a maximum of one Convenience/Specialty Food Store and the Recreational Establishment into the CE-33 and CE-34 zones; and, add Automotive Uses, Restaurant Uses and Veterinary Services into the CE-33 zone. The applicant has not identified any future tenants for the additional uses to be added or the location of these uses. The intent of the application is to support additional flexibility in leasing the existing spaces on the subject lands to prevent vacancies. The Employment Commercial designation in the Official Plan (1997, as amended) allows for a wide range of employment uses and also a limited range of retail commercial uses which have employment characteristics such

as servicing business uses; requiring expansive land areas; locating in or adjacent to employment area; and are not intended to serve the regular daily or weekly shopping needs to the surrounding residential and business community. The subject property was previously subject to the Employment Area Overlay which has now been removed from the subject property and is only located within the Urban Area within the Halton Region Official Plan. The Official Plan (1997, as amended) does not explicitly state that recreation uses are permitted; however, the Zoning By-law that regulates the use of the property, lists a recreational establishment as a permitted use in the Employment Commercial zone. In this case, a recreation establishment is only prohibited due to the exception CE-33 and CE-34 zones. If the property was not subject to the exception zoning, recreation establishment would be permitted as-of-right on the subject property. Further, the Official Plan (2020) envisions recreation uses within the future Employment Commercial Centre designation. Additionally, Planning Staff are recommending a holding provision be implemented on the site to require a Phase 1 Environmental Site Assessment and Record of Site Condition to be completed prior to permitting a recreational establishment as it is a sensitive use. Planning Staff are confident that the holding provision will appropriately address any concerns related to permitting a recreational establishment.

Planning Staff have considered the impacts of permitting the retail and service commercial uses, automotive uses, and recreation establishment use on the properties and the ability for the employment function to be maintained. The intent of the Employment Commercial designation is to provide a wide range of employment uses and also a limited range of retail commercial uses which have employment characteristics. The subject lands currently contain large scale retail commercial uses, a fitness club/health spa, a daycare facility, and a convenience/specialty food store. The subject lands would continue to permit a range of employment uses across the sites while providing further flexibility for future retail and service commercial uses. Planning Staff have considered whether a recreation establishment use would limit the possibility for future employment uses but have considered that there is already a daycare facility and fitness club/health spa (yoga studio) located at 2202-2208 Industrial Street. Planning Staff do not anticipate any negative impacts with the introduction of retail and service commercial uses or recreational establishment uses when considering the existing uses across the sites.

Land Use Compatibility

The proposal request to add a wide range of Automotive Uses as listed in Part 4, Table 4.2.1 of the Zoning By-law which is considered a new industrial use in the D-Series Guidelines. These include Cash Wash, Motor Vehicle Service Station, Motor Vehicle Sales, Leasing, Rental, and Service, Motor Vehicle Repair Garage, Motor Vehicle Parts & Accessory Sales, and Retail Propane Facility. These uses are defined in Part 16 of the Zoning By-law. Currently, Automotive Uses are permitted in CE-34 which is 2202-2208 Industrial Street. There is also an existing Tire Installation use at 1225 Brant Street zoned CR-35 (Regional Commercial) and Automotive Use at 2235 Industrial Street zoned CN2 (Neighbourhood Commercial). The proposal is to add Automotive Uses to the CE-33 zone which is 1510 and 1515 North Service Road. Planning Staff have considered that there are residential properties along Mountainside Road and Dequincy

Crescent to the north as well as parkland (Roly Bird Park). The parkland is located on lands owned by City of Burlington and the Hydro One Corridor. The width of this area is approximately 70 metres. For a Class 1 use to residential uses the area of influence is 70 metres and the minimum separation distance is 20 metres. For a Class 2 use to residential uses the area of influence is 300 metres and the minimum separation distance is 70 metres. The applicant has not submitted a Land Use Compatibility Study to confirm that there will be no impacts to the existing sensitive uses. As mentioned, there is an existing Tire Installation use at 1225 Brant Street immediately adjacent to 1510 North Service Road. In reviewing CR-35 which permits the Tire Installation use, the use is only permitted facing the highway at the opposite side of the lot than the residential use. The remainder of the building is a large scale retail/warehousing use which is an added buffer to the residential use. The existing building at 1510 North Service Road faces the residential use and would need to be assessed for land use compatibility. Further, 1515 North Service Road directly abuts the parkland (Roly Bird Park) and the residential properties. Planning Staff are recommending that the request for Automotive Uses being refused and continue to be included in the prohibited uses of the CE-33 zone.

Zoning By-law

The subject properties are currently zoned Employment Commercial (CE-33 and CE-34). The applicant has requested to add a maximum of one Convenience/Specialty Food Store and the Recreational Establishment into the CE-33 and CE-34 zones; and, add Automotive Uses, Restaurant Uses and Veterinary Services into the CE-33 zone.

As per the analysis provided of the Zoning By-law 2020 under Appendix E – Detailed Policy Analysis, staff is of the opinion that the proposed amendments as modified by staff are consistent with Provincial directions, conform to the Regional Plan and maintain the general intent of the Local Official Plans and are appropriate for the subject lands.

Technical Review

The application was circulated to internal staff and external agencies on May 2, 2025, for review. The following are summaries of the comments received:

City of Burlington – Finance – requests as a condition of development that, “taxes must be paid on parcels associated with this file. This includes all outstanding balances plus current year taxes that have been billed but not yet due.”

City of Burlington – Urban Forestry and Landscaping – no comment.

City of Burlington – Parks and Open Space – No concerns with the proposed development.

City of Burlington – Transportation Planning – Transportation Planning support the Zoning By-Law Amendment to permit additional uses. The application has no impacts on the transportation network and Transportation Planning has no concerns at this time. The parking supply will need to be re-reviewed and confirmed with any future application for automotive uses,

where a Parking Justification Report may be required at that time if a parking reduction is being proposed.

City of Burlington – Zoning – Amendments required to the Zoning By-law have been identified and included as part of the draft by-law to reflect the proposed development.

City of Burlington – Development Engineering – If the development proposes a change of property use to a more sensitive use and therefore, in accordance with Ontario Regulation 153/04, as amended, a Record of Site Condition will be required. If there are any proposed grading or servicing alterations, then the supporting Engineering Plans and Report must be provided prior to Site Plan Application.

City of Burlington – Heritage – No comments.

Halton Region – Regional staff have no objection to the approval of the proposed ZBA.

Halton Police - No concerns with this proposal as it doesn't interfere with our line-of-sight radio system.

Imperial Infrastructure – No infrastructure in the area.

Rogers Communications – No comments.

Sun-Canadian Pipe Line - Does not operate any facilities near the property.

Rogers Communications – No comments.

Metrolinx – No comments.

Ministry of Transportation – No comments. The properties are located within the Ministry's Permit Control Area for the QEW which may require MTO permits.

Recommendation Details

- The proposed amendments are consistent with the Provincial Planning Statement (2024);
- The proposed amendments conform with the Regional Official Plan (2009, as amended);
- The proposed amendments conform to the Burlington Official Plan (1997) and have regard for Burlington Official Plan (2020);
- The proposed development maintains the general intent of Zoning By-law 2020.

Key Dates & Milestones

- Application submitted: April 23, 2025
- Application deemed complete: May 2, 2025
- Statutory public meeting: July 8, 2025

- Council meeting: July 15, 2025
- Statutory deadline: July 22, 2025

Implications

Financial

All application fees have been received in accordance with the Development Application Fee Schedule.

Climate Implications

In February 2020, City Council approved the City of Burlington Climate Action Plan to support the City's path towards a low-carbon future, focusing on mitigating greenhouse gases and reducing energy consumption. The Plan identifies seven implementation programs, including, programs to enhance energy performance for new and existing buildings; increase transit and active transportation mode shares; encourage the adoption of electric mobility and equipment through personal and commercial vehicles and other currently gas-powered equipment; and support waste reduction and diversion.

No new development or site alteration is proposed through the submitted Zoning By-law Amendment. The application to add additional uses will provide further flexibility across the Employment Commercial site allowing for the full use of the units which have been vacant.

Engagement Matters

Notice signs were posted on the subject lands on May 27, 2025. A public notice of the Zoning By-law Amendment application was mailed to 54 addresses, which includes all property owners and tenants within 120 metres of the subject land.

A webpage was created on the City of Burlington website, accessible at www.burlington.ca/1510northservice. This webpage provides information about the subject application including dates of public meetings, links to supporting studies, and contact information for the applicant's representative and Community Planning Department.

As of the time of writing this report, 1 written public comment has been received by staff with respect to the subject application in support of the proposal. The public comment received to date has been included in Appendix C – Public Comments.

References

- 1510 North Service Road Phase 1 ESA prepared by S2S Environmental Inc dated April 6, 2017;
- 1515 North Service Road Phase 1 ESA prepared by S2S Environmental Inc dated March 15, 2023;
- 2200-2210 Phase 1 ESA prepared by S2S Environmental Inc dated October 16, 2016;
- Cover Letter prepared by The Biglieri Group dated April 8, 2025;
- Draft Zoning By-law Amendment prepared by The Biglieri Group dated April 2025;
- Planning Rationale Report prepared by The Biglieri Group dated April 2025;
- Site Screening Questionnaire dated January 20, 2025;
- 1510 Site Plan prepared by Fabiani Architect dated January 15, 2002;
- 1515 Site Plan prepared by Fabiani Architect dated October 27, 2006;
- 2202-2208 Site Plan prepared by Fabiani Architect dated November 4, 2014;
- Sanitary and Water Servicing Letter prepared by Crozier dated April 23, 2025; and,
- Application Form dated April 8, 2025.

A full list of submitted studies and reports can be found at www.burlington.ca/1510northservice

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Strategic Alignment

(Select all that apply)

☑ Designing and delivering complete communities

☐ Providing the best services and experiences

☑ Protecting and improving the natural environment and taking action on climate change

☐ Driving organizational performance

Author:

Jaclyn Schneider
Planner, Community Planning Department
Jaclyn.schneider@burlington.ca

Appendices:

A. Existing Zoning
B. Concept Plan
C. Public Comments
D. Draft Zoning By-law Amendment
E. Detail Policy Analysis

Draft By-laws for Approval at Council:

- The By-law will be brought to City Council on July 15, 2025.

Notifications:

Michael Testaguzza, Partner, The Biglieri Group
Phone: 416-693-9155 ex. 228
Email: mtestaguzza@thebiglierigroup.com

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Sketch No. 3

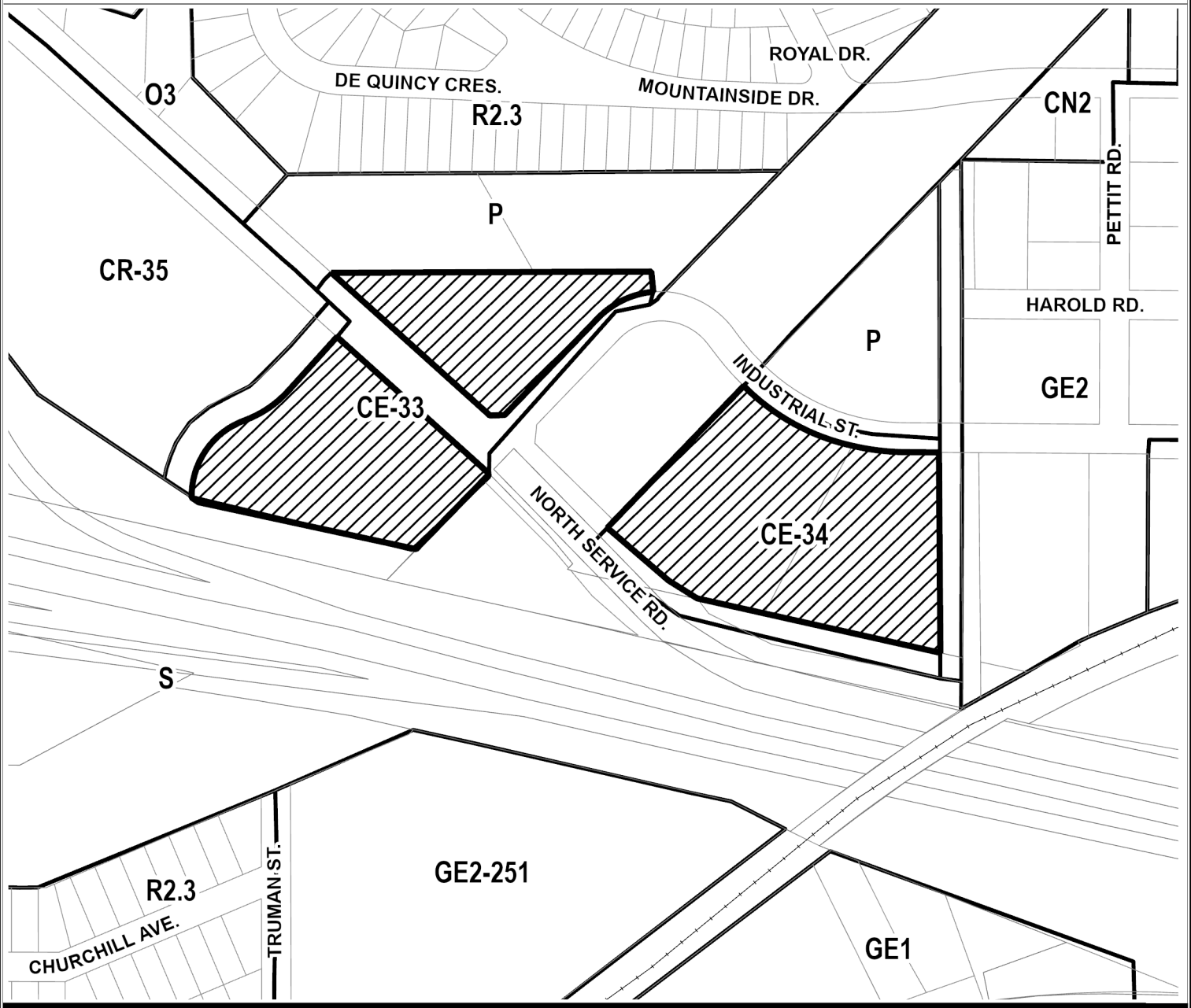
Appendix A to DGM-52-25

EXISTING ZONING

The proposal requests a Zoning By-law Amendment to add Convenience/Specialty Food Store, Automotive Uses, Recreational Establishments, Restaurant Uses and Veterinary Services into the existing CE-33 and CE-34 zones.

SUBJECT PROPERTY

File No. 520-08/25



GENERAL ZONING LEGEND

Low Density	Medium Density	High Density	Mixed Use	Commercial	Employment	Other
R2.3				CE CN2 CR	GE1 GE2	O3 P S

Date: April 28, 2025
Community Planning Department

TERANET CITY OF Burlington

Sketch No. 1

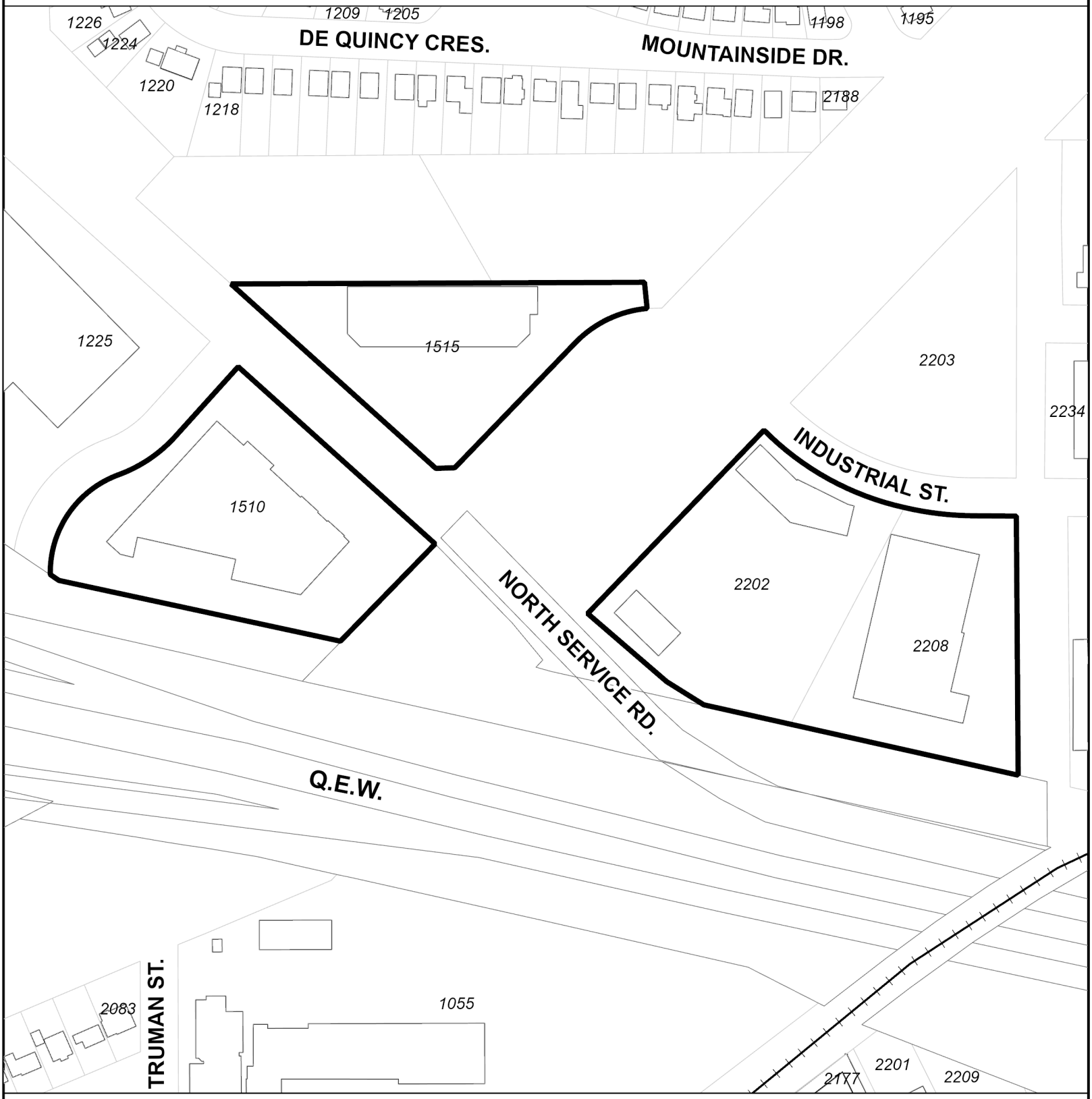
CONCEPT PLAN

Appendix B to DGM-52-25

The proposal requests a Zoning By-law Amendment to add Convenience/Specialty Food Store, Automotive Uses, Recreational Establishments, Restaurant Uses and Veterinary Services into the existing CE-33 and CE-34 zones.

SUBJECT PROPERTIES

File No. 520-08/25



Date: 4/28/2025

Community Planning Department

0 50 100 150

Meters

TERANET

CITY OF Burlington

Schneider, Jaclyn

From: Mailbox, Office of the Mayor
Sent: Friday, May 16, 2025 4:35 PM
To: Bruce Campbell
Cc: Alexandra Kau; Bridget Dussault; Jackie Rullo; LIST - Office of Ward 3; Schneider, Jaclyn; Wallace, William
Subject: RE: Burlington Veterinary Emergency & Referral

Follow Up Flag: Follow up
Flag Status: Flagged

Hi Bruce,

Thank you very much for including the Mayor in your email. The Mayor is aware of your communication and is happy to hear this positive update!

Development files listed on the Committee of the Whole agenda are determined by Planning staff, as this is dependent on their review work and recommendation report being complete in time for the agenda submission. I've included the Planning team working on this file, to connect with you directly around expected timelines.

As always, our team is standing by to assist where appropriate.
Kind regards,

Hannelie van Niekerk | Executive Administrator
Office of Mayor Marianne Meed Ward | City of Burlington

Our working hours may be different. You are not obligated to reply outside of your typical working hours

From: Bruce Campbell <
Sent: Wednesday, May 14, 2025 5:03 PM
To: Meed Ward, Marianne <Marianne.MeedWard@burlington.ca>; Mailbox, Office of the Mayor <mayor@burlington burlington.ca>
Cc: Alexandra Kau < Bridget Dussault Jackie Rullo

Subject: Burlington Veterinary Emergency & Referral

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Mayor Mead Ward and Councillor Nisan,

I hope you are both well!

Thank you for your continued support of our efforts to get up and running with offering full-service Emergency and Referral Veterinary medicine in Burlington. I want to confirm that we have a signed offer to lease on 1515 North Service Road, just east of Brant Street - which optimizes access to these services for Burlington's residents, given the central location.

In order for this site to work for our use, a zoning amendment is required. The landlord, represented by Alexandra Kau and Bridget Dussault (both cc'd) has made this application and we are supporting this work, including contribution to the cost of the application process (see excerpt below - File Nos 520-08/25, deemed complete May 12, 2025). Our hope is that this approval could be brought forward as soon as possible - perhaps to the July 7th CoW and July 15th Council for approval? Otherwise we fear we may have to wait until September 8th/15th respectively.

Please let me know if there is anything that I can do to assist the process in any way. After 6 years of work on this project, and a couple false starts, we are eager to get going!

Many thanks,

Bruce

- - -
Thought of the week:

"Trust in a relationship is a fragile thing, because trust requires allowing others to see as much of our real selves a we have the courage to reveal.. overcoming that fear. Or rather learning low to love and how to trust in spite of it. It takes a little courage and a very strong partner." ~ Bruce Springsteen
- - -
BRUCE CAMPBELL (HE / HIM)
P3 Veterinary Partners

BY-LAW NUMBER 2020.508, SCHEDULE 'A' AND EXPLANATORY NOTE

THE CORPORATION OF THE CITY OF BURLINGTON

BY-LAW NUMBER 2020.508

A By-law to amend By-law 2020, as amended; 1510 & 1515 North Service Road and 2202-2208 Industrial Street
File No.: 520-08/25, DGM-52-2025

WHEREAS Section 34(1) of the Planning Act, R.S.O. 1990, c. P. 13, as amended, states that Zoning By-laws may be passed by the councils of local municipalities; and

WHEREAS the Council of the Corporation of the City of Burlington approved Recommendation DGM-52-2025 on July 15, 2025, to amend the City's existing Zoning By-law 2020, as amended, to add one Convenience/Specialty Food Store and add Recreational Establishments to the CE-33 and CE-34 zones, and add Automotive Uses, Restaurant Uses, and Veterinary Services to the CE-33 zone;

THE COUNCIL OF THE CORPORATION OF THE CITY OF BURLINGTON HEREBY ENACTS AS FOLLOWS:

1. Part 11 of By-law 2020, as amended, Holding Zone Provisions, is hereby amended by the addition of the following section to Appendix A:

#103 and #104	H-CE-33 and H-CE-34	Map 15W	Resolution: XXX

The Holding symbol shall allow for all permitted uses within Part 2 of H-CE-33 and CE-34 and Part 4, Commercial Zones, and only apply to the Recreational Establishment and be removed from the zone designation by way of an amending zoning by-law when the following has been completed:

A. The submission of a Phase 1 ESA in accordance with O.reg 153/04 and a Record of Site Condition to address the Recreational Establishment Use to the satisfaction of the Director of Community Planning.

2. PART 14 of By-law 2020, as amended, Exceptions to Zone Designations, is amended by repealing and replacing Exception 33 and Exception 34 as it pertains to 1510 and 1515 North Service Road and 2202-2208 Industrial Street, with the following:

Exception	Zone	Map	Amendment	Enacted
33	**H-CE-33**	**15W**	**2020.90 2020.205 2020.293 (PL080169 and PL080632) 2020.365 2020.508**	**July 3/01 April 28/08 June 2/10 April 11, 2016**

(1) Holding Provision:

Notwithstanding the regulations of Part 11, Section 1.1, where the zone designation includes an 'H' Holding symbol prefix, the following shall apply:

a) Permitted uses prior to "H" (Holding) being lifted:
   i. all permitted uses in the CE zone and CE-33 zone, except recreational establishments

b) Additional permitted use following H being lifted:
   i. Recreational establishment

(2) Additional Permitted Uses:

Caterer
Fitness Club/Health Spa
Hotel subject to footnote (e) of Part 3, Table 3.2.1

Retailing of:

Furniture
Billiard Tables
Garden, Patio Furniture & Accessories
Fitness Equipment
Home Appliances
Tools, Equipment, and Special Events Rental
Fireplaces
Designer and Landscape services
Fabrics, Upholstery and associated supplies and equipment
A maximum of one Convenience/Specialty Food Store on all lands zoned CE-33

(3) Prohibited Uses:

Pharmaceuticals and Medicines
Automotive Uses
Convention/Conference Centre

Banquet Centre
Outdoor Patio
Night Club
Private Propane Facility
Machinery and Equipment
Night club, banquet, or conference facilities are prohibited as accessory uses to a hotel

(4) Regulations:

a) Building Height:

i. North of North Service Road: Two storeys up to 8.8 metres maximum, plus an additional height of architectural parapet is permitted of 4.3 metres along a maximum of 40% of any building elevation.

ii. Two storeys up to 13.5 m maximum south of North Service Road

b) Yard

i.	Yard abutting a street:	6 m
ii.	Yard abutting a P zone:	1.2 m
iii.	Yard abutting the Queen Elizabeth Way:	14 m
iv.	Landscape area abutting a P zone:	1.2 m
v.	Landscape area abutting the Queen Elizabeth Way:	6 m
vi.	Outside Storage:	Prohibited

c) One standard restaurant with a maximum gross floor area of 560 m^2 and one accessory outdoor patio are permitted in a multi-unit building on a property south of North Service Road.

d) Parking

i. Off-street parking for all permitted uses shall be provided at the rate of 3.2 spaces per 100 m^2 gross floor area.

e) Garbage facilities, loading, parking, driveways and docks for loading or unloading are not permitted between any building and the boundary of a P zone.

f) Part 4, Commercial Zones, Section 5, CE Zone Regulations, Subsection 5.5, Floor Area, shall not apply.

g) On lots or blocks located north of the North Service Road, garbage facilities, vehicles for loading, driveways and docks for loading or unloading are permitted along 25% of the total building elevation facing North Service Road and Industrial Street.

h) Garbage facilities, loading and docks for loading or unloading are only permitted along the southerly, easterly, and westerly building elevations of lots or blocks abutting the Queen Elizabeth Way, provided that the docks and doors are screened from view from the Queen Elizabeth Way.

i) An exterior wall facing a residential zone may have a maximum length of 110 m.

j) The total floor area of the following "additional permitted uses" and those uses listed in footnote (c) of Part 4, Table 4.2.1, located on all lands zoned CE-33 and CE-34, shall not exceed 15,800 m^2:

   i. Furniture

   ii. Garden, Patio Furniture & Accessories

   iii. Home Appliances

k) Banks, Trust Companies, and Credit Unions shall not be subject to footnote (h) to Part 4, Table 4.2.1

l) Notwithstanding footnote (h) to Part 4, Table 4.2.1, the total floor area of "Other Service Commercial Uses" shall not exceed 15% of the floor area of all buildings on the lot.

Except as amended herein, all other provisions of the By-law, as amended, shall apply.

Exception 34	Zone H-CE-34	Map 15W	Amendment 2020.90 2020.205 2020.293 (PL080169 and PL080632) 2020.306 2020.508	Enacted July 3/01 April 28/08 June 2/10 October 4/11

(1) Holding Provision:

Notwithstanding the regulations of Part 11, Section 1.1, where the zone designation includes an 'H' Holding symbol prefix, the following shall apply:

a) Permitted uses prior to “H” (Holding) being lifted:
   i. all permitted uses in the CE zone and CE-34 zone, except recreational establishments

b) Additional permitted use following H being lifted:
   i. Recreational establishment

(2) Additional Permitted Uses:

Hotel subject to footnote (e) of Part 3, Table 3.2.1
Caterer
Fitness Club/Health Spa

Retailing of:

Furniture
Garden, Patio Furniture, and Accessories
Home Appliances
Fireplaces
Fabrics, Upholstery, and associated supplies and equipment
Designer and Landscape services
Billiard Tables
Fitness Equipment
Tools, Equipment, and Special Events Rentals
Sporting Goods
A maximum of one Convenience/Specialty Food Store on all lands zoned CE-34

(3) Prohibited Uses:

Convention/Conference Centre
Banquet Centre
Night Club
Night club, banquet, or conference facilities are prohibited as accessory uses to a hotel

(4) Regulations:

a) Yards

   i. Yard abutting Industrial Street and the North Service Road: 6 m

   ii. Yard abutting the Queen Elizabeth Way: 14 m

iii. Landscape Area abutting Industrial Street: 6 m

iv. Landscape Area abutting the southerly property boundary: 6 m

v. Building Height: 2 storeys up to 13.5 m maximum

vi. Outdoor Storage: Prohibited

vii. Maximum floor area ratio: 0.33:1

b) One standard restaurant with a maximum floor area of 560 m^2 and one accessory outdoor patio is permitted, subject to the following:
   i. Setback from Industrial Street to a restaurant use: 50 m
   ii. Setback from the easterly property line to a restaurant use: 100 m
   iii. Setback from a residential zone to an outdoor patio use: 220 m

c) Garbage facilities are not permitted in any building elevation facing a street. These facilities are permitted along other elevations, only provided that they are screened from view of a street.

d) Notwithstanding the above, one garbage compactor with one attached garbage bin may be permitted in a building elevation facing Industrial Street and North Service Road without screening, provided it is set back a minimum of 80 m from the property line abutting Industrial Street and a minimum of 30 m from the south property line.

e) Parking for all permitted uses shall be provided at the rate of 3.2 spaces per 100 m^2 gross floor area. Except that parking for a sporting goods store shall be provided at the rate of 4 spaces per 100 m^2 gross floor area.

f) The total floor area of the following “additional permitted uses” and those uses listed in footnote (c) of Part 4, Table 4.2.1, located on all lands zoned CE-33 and CE-34, shall not exceed 15,800 m^2:

   i. Furniture

   ii. Garden, Patio Furniture & Accessories

   iii. Home Appliances

g) Banks, Trust Companies, and Credit Unions shall not be subject to footnote (h) to Part 4, Table 4.2.1.

h) Notwithstanding footnote (h) to Part 4, Table 4.2.1, the total floor area of “Other Service Commercial Uses” shall not exceed 15% of the floor area of all buildings on the lot.

i) Part 4, Commercial Zones, Section 5, CE Zone regulations, Subsection 5.5, Floor Area, shall not apply. j) Notwithstanding Part 4, subsection 5.7 (a), a loading/unloading dock is permitted on a building elevation facing Industrial Street, provided the loading/unloading dock is set back a minimum of 80 m from the property line abutting Industrial Street.
Except as amended herein, all other provisions of the By-law, as amended, shall apply.

3 a) When no notice of appeal is filed pursuant to the provisions of the *Planning Act*, R.S.O. 1990, c.P.13, as amended, this By-law shall be deemed to have come into force on the day it was passed;

3 b) If one or more appeals are filed pursuant to the provisions of the Planning Act, as amended, this By-law does not come into force until all appeals have been finally disposed of, and except for such parts as are repealed or amended in accordance with an order of the Ontario Land Tribunal this By-law shall be deemed to have come into force on the day it was passed.

ENACTED AND PASSED this ……..day of …… 2025.

_____MAYOR

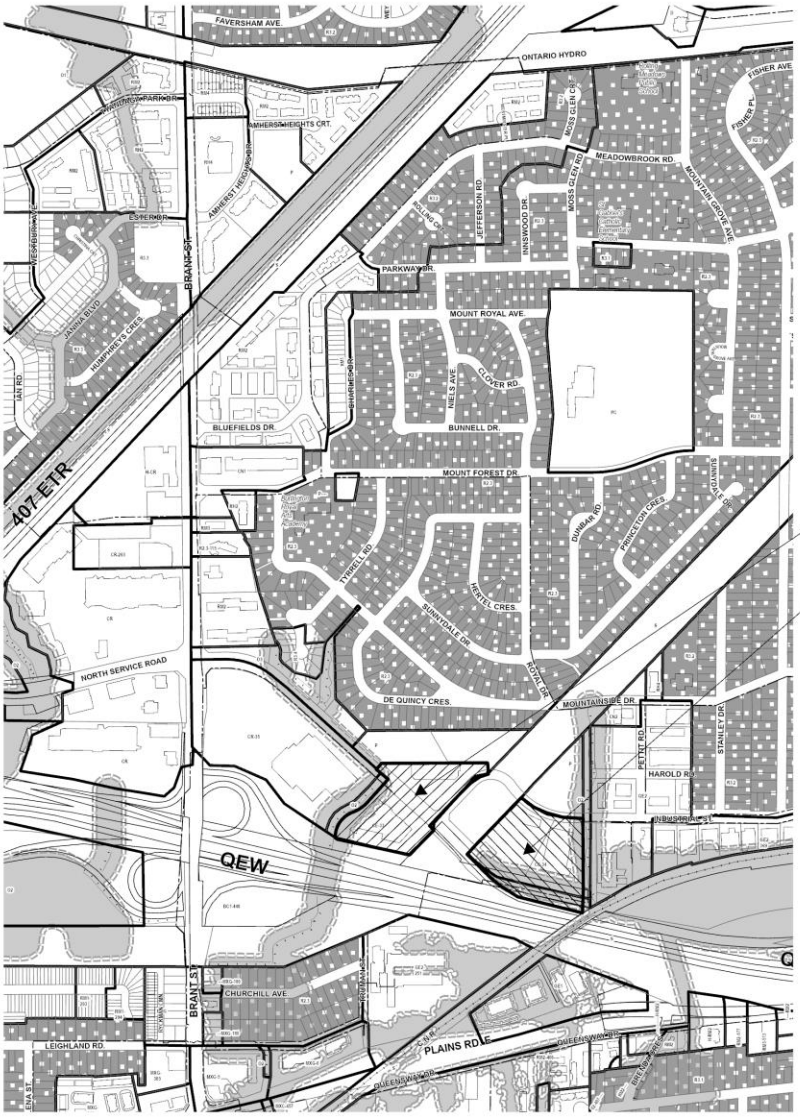
_____CITY CLERK

EXPLANATION OF PURPOSE AND EFFECT OF BY-LAW 2020.508

By-law 2020.508 rezones lands on 1510 & 1515 North Service Road and 2202-2208 Industrial Street, to a add additional permitted uses into the existing CE-33 and CE-34 zones on the subject lands.

For further information regarding By-law 2020.508, please contact Jaclyn Schneider of the Burlington Community Planning Department at (905) 335-7600, extension 7326.

SCHEDULE "A"



Area 'A'

Area 'A' to be rezoned from CE-33 to H-CE-33

Area 'B'

Area 'B' to be rezoned from CE-34 to H-CE-34

SCHEDULE 'A' TO BY-LAW 2020.508 AMENDING MAP NO. 15W PART 15, BY-LAW 2020 AS AMENDED. PASSED THE 4th DAY OF MARCH, 2025

---------- MAYOR

---------- CITY CLERK

TERANET Burlington
Community Planning Department

Detailed Planning Analysis

The application is subject to the following framework: the Provincial Planning Statement (PPS), the Halton Region Official Plan, the City of Burlington Official Plan (1997 and 2020), and City of Burlington Zoning By-law 2020. Planning staff has reviewed the application in the context of this planning framework. The planning merits of the application within this policy framework are provided below.

1.0 The Provincial Planning Statement, 2024 (PPS)

The PPS came into force and effect on October 20, 2024, and applies to decisions concerning planning matters occurring after this date. This replaces the Provincial Policy Statement (2020) and A Place to Grow: Growth Plan for the Greater Golden Horseshoe (The Growth Plan) (2019). The PPS provides broad policy direction on matters of provincial interest related to land use planning and development and supports improved land use planning and management, which contributes to a more effective and efficient land use planning system.

The subject properties are located within the Urban Area in the Halton Region Official Plan and designated Employment Commercial in the local Official Plan. As per Section 2.1 and 2.3 of the PPS, the proposal provides for a mix of land uses by adding Convenience/Specialty Food Store, Automotive Uses, Recreational Establishments, Restaurant Uses and Veterinary Services to the existing Employment Commercial designated properties. However, Planning Staff have considered Section 3.5 of the PPS which states that major facilities and sensitive land uses shall be planned and developed to avoid, or if avoidance is not possible, minimize and mitigate any potential adverse effects from odour, noise, and other contaminants, minimize risk to public health and safety, and to ensure the long-term operational and economic viability of major facilities in accordance with provincial guidelines, standards and procedures. Planning Staff have considered that the Automotive Uses proposed may have negative impacts on the existing sensitive uses (ie. residential, parkland, and daycare centre). The applicant did not submit a Land Use Compatibility Study with the application package. Planning Staff would recommend modified approval of the proposal to continue to prohibit Automotive Uses in the CE-33 zone as a Land Use Compatibility Study was not provided.

Planning staff is of the opinion that the proposal as modified by Planning Staff is consistent with the PPS.

2.0 Halton Region Official Plan (2009, as amended)

Section 44 of the Regional Official Plan (ROP) provides “broad policy directions on strategic matters such as management of land and natural resources, growth strategies, housing, economic development, water and wastewater services, solid waste management, transportation, and health and social services”. The Planning Act requires

that Burlington's Official Plan and Zoning By-law be amended to conform with the ROP. In accordance with Map 1H – Regional Urban Structure of the ROP, as amended, the subject lands are designated 'Urban Area'.

The Urban Area (Section 72) policies of the Regional Official Plan (ROP) identify that the goal of the Urban Area and the Regional Urban Structure is to manage growth in a manner that fosters complete communities, enhances mobility across Halton, addresses climate change, and improves housing affordability, sustainability and economic prosperity.

Within the Urban Area, the Regional Urban Structure as shown on Map 1H implements Halton's planning vision and growth management strategy to ensure efficient use of land, amongst other matters.

Section 118 (1) of the ROP requires Local Official Plans and Zoning By-laws to recognize the Regional Natural Heritage Systems and include policies and mapping to implement the ROP. The subject properties are adjacent to or within proximity to watercourses (i.e. west of 1510 North Service Road and east of 2208 Industrial Street). Further, the subject lands are adjacent to or in proximity to potential unmapped features. Conservation Halton was circulated at the Pre-Consultation stage of the proposal and indicated that the lands are regulated by Conservation Halton as they are adjacent to tributaries of Upper Rambo Creek and contain the erosion hazard and flood hazard associated with that watercourse, along the regulatory allowance. However, Conservation Halton has no concerns with the proposed Zoning By-law Amendment application as no site modifications are required or proposed to accommodate the changes in use.

Section 143 (10) of the ROP requires the Region, in consultation with local municipalities, to develop Land Use Compatibility Guidelines to minimize the adverse effects of noise, vibration, odour and air pollution from industrial, transportation and utility sources on sensitive land uses, including the application of separation distance between these non-compatible uses. The Land Use Compatibility Guidelines (2014) reference the Ministry of Environment, Conservation and Park D-Series Guidelines. The MECPs D-Series are applicable when:

- new sensitive land use requires a land use amendment and is proposed to be located within the influence, or potential influence, area of an impacting use, such as an existing industrial land use; or when a
- new industrial use requires a land use amendment and is proposed to be located near an existing sensitive residential use.

The proposal requests a Zoning By-law Amendment to add a maximum of one Convenience/Specialty Food Store and the Recreational Establishment into the CE-33 and CE-34 zones; and, add Automotive Uses, Restaurant Uses, and Veterinary Services into the CE-33 zone. The Recreational Establishment is a new sensitive land use proposed to be added to all the properties as it is currently prohibited through CE-33 and

CE-34. Planning Staff have considered the existing uses on the property and the surrounding residential uses and parkland (Roly Bird Park) north of the properties. Planning Staff have also considered that there is a daycare centre and fitness club/health spa (yoga studio) on 2202-2208 Industrial Street. As per Part 1, 2.21 f) of the Zoning By-law, a daycare is permitted in the Employment Commercial zone. Considering the existing sensitive uses in the area, Planning Staff do not anticipate any negative impacts to the proposed recreational establishment use provided a Phase One ESA and Record of Site Condition are completed to address any concerns with site contamination.

The new industrial use being proposed is the wide range of Automotive Uses as listed in Part 4, Table 4.2.1 of the Zoning By-law. These include Cash Wash, Motor Vehicle Service Station, Motor Vehicle Sales, Leasing, Rental, and Service, Motor Vehicle Repair Garage, Motor Vehicle Parts & Accessory Sales, and Retail Propane Facility. These uses are defined in Part 16 of the Zoning By-law. Currently, Automotive Uses are permitted in CE-34 which is 2202-2208 Industrial Street. There is also an existing Tire Installation use at 1225 Brant Street zoned CR-35 (Regional Commercial) and Automotive Use at 2235 Industrial Street zoned CN2 (Neighbourhood Commercial). The proposal is to add Automotive Uses to the CE-33 zone which is 1510 and 1515 North Service Road. Planning Staff have considered that there are residential properties along Mountainside Road and Dequincy Crescent to the north as well as parkland (Roly Bird Park). The parkland is located on lands owned by City of Burlington and the Hydro One Corridor. The width of this area is approximately 70 metres. For a Class 1 use to residential uses the area of influence is 70 metres and the minimum separation distance is 20 metres. For a Class 2 use to residential uses the area of influence is 300 metres and the minimum separation distance is 70 metres. The applicant has not submitted a Land Use Compatibility Study to confirm that there will be no impacts to the existing sensitive uses. As mentioned, there is an existing Tire Installation use at 1225 Brant Street immediately adjacent to 1510 North Service Road. In reviewing CR-35 which permits the Tire Installation use, the use is only permitted facing the highway at the opposite side of the lot than the residential use. The remainder of the building is a large scale retail/warehousing use which is an added buffer to the residential use. The existing building at 1510 North Service Road faces the residential use and would need to be assessed for land use compatibility. Further, 1515 North Service Road directly abuts the parkland (Roly Bird Park) and the residential properties. Planning Staff are recommending that the request for Automotive Uses being refused and continue to be included in the prohibited uses of the CE-33 zone.

Section 147 (17) of the ROP requires the applicant undertake a process in accordance with the Region's Guidelines (Protocol) for Reviewing Development Applications with Respect to Contaminated or Potentially Contaminated Sites and any applicable Provincial legislation, regulations and guidelines to determine whether there is any potential contamination on the site and the steps necessary to bring the site to a condition suitable

for its intended use. The applicant is required to follow the processes outlined in O.Reg 153/04 in the preparation of all Environmental Site Assessment (ESA) reports and supporting documentation. ESA reports must be no older than 18 months old. Further, O.Reg 153/04 states that a person shall not change the use of the property for the purposes of clause 168.3.1 (1) b) of the Act in any of the following matters:

- 10. ii) a change from an industrial use, a commercial use or a community use, other than a community use described in subparagraphs I and ii, to a community use, that is an indoor swimming pool, an indoor ice rink, an indoor arena, an enclosed stadium, and indoor sports field or an indoor gymnasium.

As such, the Recreational Use proposed would trigger a Record of Site Condition.

The applicant has submitted Phase 1 ESAs for the subject properties that are not to O.Reg 153/04 standards and are older than 18 months. The only sensitive use being proposed through this application is the Recreational Establishment. Therefore, Planning Staff are recommending a holding provision to require a Phase One ESA and Record of Site Condition be completed prior to permitting a Recreational Establishment.

As per the analysis provided, Planning Staff are of the opinion that the proposed Zoning By-law Amendment as modified by Planning Staff with the holding provision conforms with the ROP.

3.0 City of Burlington Official Plan (1997, as amended)

The subject property is identified as “Major Retail” on Schedule A, Settlement Pattern. These lands provide locations where the primary use of land involves the buying and selling of services and goods on a City-wide or community-wide basis (Part III, Subsection 4.0).

According to the policies of “Major Retail Areas” Part III, Subsection 4.2.2 (iii), Employment Commercial areas shall allow for a wide range of employment uses and also a limited range of retail commercial uses which have employment characteristics, such as:

- serving business uses to a large extent.
- requiring expansive land areas which cannot be easily accommodated in community and regional commercial areas.
- often locating in or adjacent to employment areas.
- are not intended to serve the regular daily and weekly shopping needs of the surrounding residential and business community.

As per Part III, Subsection 4.2.2 c), Employment Commercial areas shall be developed for large-scale retail uses which cannot be easily accommodated in the other commercial areas and which also serve the business community.

As per Part III, Subsection 4.2.2 g), in addition to the above, any proposal for additional retail uses which includes a warehouse club, supermarket/grocery store or large department store, or the sale of food in excess of 1,800 sq. m. in area, shall require the submission of a comprehensive market impact study which assesses the market impact of the proposal on existing and designated commercial areas throughout the City.

The following uses may be permitted within the Employment Commercial designation:

- uses permitted within the General Employment designation:
    - industrial uses that involve assembling, fabricating, manufacturing, processing, warehousing and distribution uses, repair activities, communications, utilities, transportation, storage, service trades and construction uses; offices uses; research and information processing; recreational uses; large scale motor vehicle dealerships; and adult entertainment uses.
    - a limited range of retail uses such as convenience stores, and a limited range of service commercial uses such as restaurants and banks, subject to the provisions of Part III, Subsection 3.3.2 d);
    - in locations adjacent to residential areas, only uses that would have a limited impact on the surrounding area will be permitted; and
    - a residence for a watchman or caretaker (Part III, Subsection 3.3.2 a)).
- commercial sales and services to the business community or those that have a significant processing, wholesaling or warehousing component;
- retail uses that require significant land areas, many with outdoor sales and storage and characterized as infrequent shopping destinations;
- home improvement and home décor sales uses which require large building areas, some of which have significant warehousing components and which are infrequent shopping destinations (Part III, Subsection 4.5.2 a)).

The retail and service commercial uses permitted under Part III, Subsection 3.3.2 a) (ii) shall be subject to the following:

i. such uses shall be ancillary to, and primarily serve, uses, businesses and employees within the surrounding employment area
ii. such uses shall only be permitted on lands having one or more buildings with a total floor area greater than 3,000 sq. m;
iii. no more than 15 per cent of the total floor area of any one building shall be used for ancillary uses, except that a restaurant may occupy up to 100 per cent of the total floor area of any one building if the total floor area of all buildings on the site is greater than 3,000 sq. m., if the total floor area of all restaurants does not exceed 15 per cent of the total floor area of all buildings on the site, and if the site abuts and has vehicular access to a major arterial, multi-purpose arterial or minor arterial road; and

iv. automotive related uses such as gas stations and car washes are not subject to clauses (ii) and (iii).

The zoning of individual sites may not allow for the full range of permitted uses or the full extent of development intensity at every location. This determination will be based on site-specific factors that may include, but not be limited to, market impact, traffic, land use compatibility, natural hazards and features, and environmental factors such as soil contamination (Part III, Subsection 4.5.2 d)).

The proposal requests a Zoning By-law Amendment to add a maximum of one Convenience/Specialty Food Store and the Recreational Establishment into the CE-33 and CE-34 zones; and, add, Automotive Uses, Restaurant Uses and Veterinary Services into the existing CE-33 zone. The applicant has not identified any future tenants for the additional uses to be added or the location of these uses. The intent of the application is to support additional flexibility in leasing the existing spaces on the subject lands to prevent vacancies. The Employment Commercial designation in the Official Plan (1997, as amended) allows for retail and service commercial uses and automotive uses. The Official Plan (1997, as amended) does not explicitly state that recreation uses are permitted. However, the Zoning By-law that regulates the use of the property and lists a recreational establishment as a permitted use in the Employment Commercial zone. In this case, a recreational establishment is only prohibited due to the exception CE-33 and CE-34 zones. If the property was not subject to the exception zoning, recreational establishment would be permitted as-of-right on the subject property. Further, the Official Plan (2020) envisions recreation uses within the future Employment Commercial Centre designation. The property also already contains a fitness club/health spa (yoga studio) and daycare centre. Additionally, Planning Staff are recommending a holding provision be implemented on the site to require a Phase One Environmental Site Assessment and Record of Site Condition to be completed prior to permitting a recreational establishment as it is a sensitive use.

Planning Staff have considered permitting the retail and service commercial uses, automotive uses, and recreation establishment use on the property and the ability for the employment function to be maintained. The intent of the Employment Commercial designation is to provide a wide range of employment uses and also a limited range of retail commercial uses which have employment characteristics. The subject lands currently contain large scale retail commercial uses, a recreational establishment, a daycare facility, and a convenience/specialty food store. The subject lands would continue to permit a range of employment uses across the sites while providing further flexibility for future retail and service commercial uses. Planning Staff have considered whether a recreational establishment use would limit the possibility for future employment uses but have considered that there is already a daycare facility and fitness club/health spa (yoga studio) located at 2202-2208 Industrial Street. Planning Staff do not anticipate

any negative impacts with the introduction of retail and service commercial uses, or recreation establishment uses when considering the existing uses across the sites provided that the recreational establishment are subject to holding provisions. Planning Staff have also considered adding the Automotive Uses to the CE-33 zoning. As mentioned, the sites already contain a fitness club/health spa (yoga studio) and daycare centre. The new industrial uses being the Automotive Uses may have land use compatibility issues. Planning Staff have not received or reviewed a Land Use Compatibility Study to ensure that there are no negative impacts to the surrounding uses (residential, daycare centre, and parkland). Planning Staff are not supportive of adding the automotive uses to the CE-33 zone without a supportive land use compatibility study.

Planning Staff have reviewed the Zoning By-law Amendment application and materials and are of the opinion that the proposed development as modified by staff with the holding provision conforms to the Official Plan (1997, as amended).

4.0 City of Burlington Official Plan (2020, as amended)

On Nov. 30, 2020, the City's new Official Plan (Burlington Official Plan, 2020) was approved by Halton Region. All parts of the Burlington Official Plan, 2020 that were not appealed came into effect the day after the end of the appeal period, Dec. 22, 2020.

Until all broad appeals of the Burlington Official Plan, 2020 are resolved through the Ontario Land Tribunal (OLT) process, parts of the old Official Plan (Burlington Official Plan 1997, as amended) will be applicable. The current Zoning By-law will remain in effect until a new comprehensive Zoning By-law is enacted and comes into effect. Policies of the Burlington Official Plan, 2020 that are not in effect are relevant as an indication of City Council's vision but are not determinative.

The City has prepared an annotated "Burlington Official Plan, 2020 (July 2024 Office Consolidation)" that reflects which policies are in effect and which are not, in accordance with all Decisions and Orders issued by the OLT under case no. OLT-22-002219, as of July 2, 2024. You can view this document by visiting the City's webpage for the Official Plan at Burlington.ca/newop.

As the OLT process continues, the Burlington Official Plan, 2020 is subject to change. Readers of the Plan must satisfy themselves as to the legal status and applicability of the policies by reviewing all Orders and Decisions from the OLT. You can view these documents by visiting the OLT's webpage for case no. OLT-22-002219: "OP - New Official Plan – City of Burlington" at jus-olt-prod.powerappsportals.com/en/e-status/.

The subject property at 1510-1515 North Service Road is identified as Mixed Use Nodes and Intensification Corridors, Schedule B – Urban Structure. As per Chapter 2, Subsection 2.3.1 l) of the Official Plan 2020, Mixed Use Nodes and Intensification Corridors will be a focus of re-urbanization. These areas vary widely and will be guided by the underlying land use designations of this Plan. Some areas will be planned to evolve

with higher residential intensities and a full mix of uses, while others may permit a more limited range of employment-oriented permitted uses, both designed to achieve their planned function. These areas will support the frequent transit corridors and provide focal points of activity and a vibrant pedestrian environment and facilitate active transportation through careful attention to urban design, enhancing the opportunities for the location of public service facilities and institutional uses.

The subject property at 1510-1515 North Service Road is identified as Employment Growth Area, Schedule B-1 – Urban Structure. Employment Growth Areas shall consist of employment oriented designations not captured within the Primary Growth or Secondary Growth Areas, and will be an area of focus for the intensification of employment as per Chapter 2.4.2 (4) a) of the Official Plan 2020.

North Service Road is identified as a Transit Support Corridor, Schedule B-2 – Urban Structure. Transit Support Corridors service lower density areas and employment uses and are intended to provide a basic level of service, such as peak service, connecting to the frequent transit corridors as per Chapter 6, Subsection 6.2.3 (2) c) of the Official Plan 2020.

The subject property at 2202-2208 Industrial Street is identified as Lands Designated for Employment Uses and Region of Halton Employment Area, Schedule B – Urban Structure. In the case of conflict, the Regional Official Plan shall be relied upon. These lands provide, in conjunction with those employment uses within the residential and mixed use area of the community, opportunities for a fully-diversified economic base, including maintaining a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses.

The subject properties at 1510-1515 North Service Road & 2202-2208 Industrial Street are identified as Employment Growth Area, Schedule B-1 – Urban Structure. Employment Growth Areas shall consist of employment oriented designations not captured within the Primary Growth or Secondary Growth Areas, and will be an area of focus for the intensification of employment as per Chapter 2.4.2 (4) a) of the Official Plan 2020.

1510-1515 North Service Road & 2202-2208 Industrial Street are designated Employment Commercial Centre, Schedule C – Urban Structure. The objectives are to provide locations in the city in close proximity to designated Employment Lands, for a wide range of employment uses, as well as retail uses which have employment characteristics, such as:

- serving business uses to a large extent;
- requiring expansive land areas which cannot be easily accommodated in Mixed Use Intensification Areas;

- and are not intended to serve the regular day-to-day and weekly shopping needs of the surrounding residential and business community and shall not compete with the planned commercial function of other Mixed Use Nodes and Intensification Corridor designations as per Chapter 8, Subsection 8.1.3 (6.1) a) of the Official Plan 2020.

The following uses may be permitted on lands designated Employment Commercial Centre:

- industrial uses that involve assembling, fabricating, manufacturing, processing, warehousing and distribution uses, repair activities, communications, utilities, transportation, storage, service trades and construction uses; office uses; research and information processing; and automotive commercial uses;
- retail and service commercial uses that serve the business community or those that have a significant processing, wholesaling or warehousing component;
- retail uses that require significant land areas, many with outdoor sales and storage and characterized as infrequent shopping destinations;
- home improvement and home décor sales uses which require large building areas, some of which have significant warehousing components and which are infrequent shopping destinations;
- hospitality uses;
- entertainment uses, and
- recreation uses.

As per the Site-Specific Policies in Chapter 8, Subsection 8.1.3(6.3) b), 1510 & 1515 North Service Road and 2202 & 2208 Industrial Street: Notwithstanding Subsection 8.1.3(6.2) d) of this Plan, the minimum floor area requirement for each individual retail unit shall not apply to the lands designated Employment Commercial Centre along the North Service Road, east of Brant Street, and identified as 1510 & 1515 North Service Road and 2202 & 2208 Industrial Street.

The proposal requests a Zoning By-law Amendment to add Convenience/Specialty Food Store and Recreational Establishments to the CE-33 and CE-34 zones; and add Automotive Uses Restaurant Uses and Veterinary Services into the existing CE-33 zone. The applicant has not identified any future tenants for the additional uses to be added of the locations of these uses. The intent of the application is to support additional flexibility in leasing the existing spaces on the subject lands to prevent vacancies. The Official Plan (2020) designates the lands as Employment Commercial Centre which permits retail and service commercial uses, automotive uses, and recreation uses. The applicant has not provided a land use compatibility study to address the automotive uses impact on the existing sensitive uses. The proposed added uses conform to the Official Plan (2020); however, Planning Staff are not including the automotive uses into the recommendation as no land use compatibility study has completed.

Planning staff have reviewed the Zoning By-law Amendment application and materials and are of the opinion that the proposed development with the modified approvals and holding provision conforms to the City's new Official Plan, 2020.

5.0 Zoning By-law 2020

The subject properties are currently zoned Employment Commercial (CE-33 and CE-34). The proposal requests a Zoning By-law Amendment to add a maximum of one Convenience/Specialty Food Store and the Recreational Establishment into the CE-33 and CE-34 zones; and, add Automotive Uses, Restaurant Uses and Veterinary Services into the CE-33 zone.

The current site-specific zoning includes a list of prohibited uses including Recreational Establishments on both CE-33 and CE-34 zoned lands, and Automotive Uses, Restaurant Uses and Veterinary Services on CE-33 zoned lands. However, the Employment Commercial zone permits Automotive Uses, Restaurant Uses, Veterinary Services, and Recreational Establishments. Further, the CE-33 and CE-34 zone permits a maximum of one Convenience/Specialty Food Store and there is currently one operating at 1510 North Service Road. These policies were written into CE-33 and CE-34 at the time of the original rezoning in 2001 when the sites were being developed, to address concerns from owners of the nearby residential properties on DeQuincy Crescent and Mountainside Drive about noise and traffic. Since the rezoning in 2001, there was a 2016 rezoning to add a standard restaurant. Due to the existing commercial function of the site, Planning Staff would recommend that the Convenience/Specialty Food Store, Restaurant Uses, and Veterinary Services be added to the zoning. However, the Recreational Establishment use shall be subject to a holding provision to address concerns with site contamination. Further, Planning Staff are not supportive of the Automotive Uses being added to the CE-33 zone as a Land Use Compatibility Study was not provided.

Planning Staff are of the opinion that the holding provision will appropriately address any concerns with site contamination. Overall, Planning Staff have recommended modified approval with a holding provision to address matters that are required to occur first.

Planning Staff are of the opinion that the Draft Zoning By-law as modified by Planning Staff in Appendix D of this report meets the intent of the Zoning By-law.