Planning and Building Department

TO: Community Development Committee

SUBJECT: Proposed Terms of Reference for the Official Plan Review Commercial Strategy Study

Report Number: PB-35-12          File Numbers: 505-08-01, 501-01
Report Date: April 30, 2012      Wards Affected:  1 2 □ 3 □ 4 □ 5 □ 6 □ All X
Date to Committee: May 28, 2012  Date to Council: June 11, 2012

Recommendation: ENDORSE the Terms of Reference for the Official Plan Review Commercial Strategy Study (Study), as attached in Appendix I of PB-35-12; and,

AUTHORIZE the Director of Planning and Building to engage consultants through a Request for Proposal process to carry out the Study in accordance with the above noted Terms of Reference.

PROVIDE the Manager of Purchasing delegated authority to award the contract and issue a PO to the highest scoring Proponent, subject to budget limitations noted within PB-35-12.

Files: 505-08-01, 501-01

Purpose: X Address goal or action in strategic plan
X Establish new or revised policy or service standard
X Respond to legislation
☐ Respond to staff direction
☐ Address other area of responsibility

Reference to Strategic Plan: X Vibrant Neighbourhoods   X Prosperity
☐ Excellence in Government   ☐ N/A
Findings from the Official Plan Review Commercial Strategy Study will address Strategic Plan directions regarding:

**Vibrant Neighbourhoods**

- Ensure that neighbourhoods and commercial areas, including the downtown, are safe and accessible places to live and gather for activities with a goal to create a strategy to redevelop aging retail areas into mixed-use “people places” (1 (b)); and

**Prosperity**

- Nurture an innovative business community and work with partners to create employment and lifestyle opportunities for people of all ages, with a goal to encourage a vibrant and healthy mixed-use downtown and with an expected milestone of completing the review and update of the Core Commitment initiative (1 (f)).

- Increase the number of people both living and working in Burlington with a goal of engaging the community in discussions on how the city can create more mixed residential/commercial places within existing neighbourhoods (2 (a)).

**Background: Pertinent Council Resolutions**

On December 12, 2011, the Community Development Committee considered staff report PB-87-11 regarding the Official Plan Review process. On December 19, 2011, Council endorsed the process to review the Official Plan (OP) and directed the Director of Planning and Building to report back with additional details regarding the proposed scope of the Official Plan Review (OPR) (referred to as the scope report) and the related public communication and engagement strategy for further consideration by Council.

The expectation is that the scope report will indicate at a conceptual level the required linkages between the communication and engagement strategy with the Official Plan and will set the framework from which the individual issue-specific work plans can be prepared.
It is important to note that the terms of reference outlining the scope of review for the Commercial Strategy Study, as attached in Appendix I (Terms of Reference for the Official Plan Review Commercial Strategy Study) is occurring in advance of the OPR scope report. This is because there are significant linkages between the Commercial Study and the review of the Downtown Vision Engagement Project (also referred to Core Commitment Update) which is currently underway. On March 9, 2012, the Community Development Committee considered staff report PB-3-12 regarding the Downtown Vision Engagement Project and on April 10, 2012, Council directed staff to consult with stakeholders on the objectives of a Commercial Study and to prepare terms of reference for a Council consideration. This report addresses that staff direction.

Discussion:

Scope of Review

As part of the 2012 Official Plan Review (OPR), the current general policies, land use policies and the structure of the Official Plan (OP) are being updated. The OPR presents an opportunity to revisit the commercial policies of the Official Plan to address Strategic Plan directions, and to ensure that the policies address the city’s current and future commercial land use needs, that commercial areas can be effectively and efficiently planned, that they are reflective of changes to commercial land use planning and trends, and that they can be effectively implemented. The review will include both retail and service commercial uses.

The emphasis of the current Official Plan Review is to develop policy that guides land use planning decisions in a planning context where intensification and infill rather than Greenfield is the primary form of development. And rather than focus on the creation of new neighbourhoods, the emphasis will be on refining existing ones. It is through this lens that the Commercial Strategy Study will be conducted. The purpose of the Study is to obtain policy direction that incorporates commercial land use planning with neighbourhood planning and urban design.

An additional area of focus is on the downtown as this area is an integral component of the current commercial system in the city. It is also an area that has been identified as an Urban Growth Centre to meet intensification targets, and because of this, its commercial role within the city has the potential to redefine itself and evolve. It is for this reason that there is a direct relationship between the Commercial Strategy Study with the Downtown Vision Engagement Project (Core Commitment Review) currently underway. Another consideration in carrying out the Study is to ensure alignment with provincial policy (e.g. Places to Grow and Provincial Policy Statement).
Comparison with Previous Official Plan Review Retail Study

The Retail Commercial Terms of Reference for the previous Official Plan Review was approved in 2002 and a study was prepared in 2003. The city was interested in reviewing the commercial designations and policies to ensure that they met the needs of the city and to review the policies in the context of changing trends in retailing, including mixed use area and retail uses in employment areas. Review considerations at that time also included land use conversions (to and from commercial designations), and commercial uses in employment areas.

Strategy/Process of Current Official Plan Review Commercial Study

Staff has prepared the Commercial Strategy Study Terms of Reference, as attached in Appendix I as a component of the Official Plan Review. Many of the considerations in the previous Official Plan Review remain relevant today and have been incorporated in the current Terms of Reference.

However, the current Terms of Reference broadens the scope of review of commercial lands to also incorporate neighbourhood planning and urban design objectives in recognition of the Strategic Plans directions regarding Vibrant Neighbourhoods and Prosperity. And as the city approaches build-out (using the remaining undeveloped land to accommodate projected growth), intensification, infill, revitalization and redevelopment will become the primary focus of planning. Over time, there will be redevelopment of plazas along nodes and corridors in the city and there is potential for improved integration into adjacent neighbourhood fabric.

Additional tools will be required to manage this type of planning (e.g. current market and supply data, updated policies, regulations, urban design guidelines, municipal programs, private-public partnerships, etc). These are considerations in the proposed Commercial Strategy Study Terms of Reference.

Findings from the Commercial Study will link to the work of the Downtown Vision Engagement Project, and to the work of the Downtown Task Group and the staff team as part of the public communication and engagement process. An objective of the public engagement process is to commence with “informed” conversations, and the background data of the Commercial Study is required to enable this to occur. Conversely, the work of the Task Group and the research completed to date as part of the Downtown Project update can also link to the work of the Commercial Strategy Study.
Financial Matters:

**Total Financial Impact**

The cost estimate for preparation of the Study by a consultant as outlined in the attached terms of reference is approximately $140,000 (plus GST). This estimate was based on a comparison with a similar recent study that was prepared for another municipality and is comparable to previous city studies when adjusted for scope and inflation. The Terms of Reference require a study cost breakdown by phase.

Also, in consideration of Procurement By-law 69-2005, as amended, staff is seeking delegated authority to award the contract and issue a purchase order to the highest scoring proponent, subject to the budget limitation noted above. By providing delegated authority to staff, the approval and award process will be expedited allowing staff to begin working with the successful proponent sooner.

**Source of Funding**

Funds for the Commercial Strategy Study will be drawn from the $800,000 currently allocated in the 2012 and 2013 Capital Budgets for the Official Plan Review (Note: $400,000 per budget year). The Terms of Reference include a few items specifically requested by the Downtown Task Group and are beyond the scope of a typical Official Plan Review commercial study. The Terms of Reference require that these items be priced separately from the Official Plan Review component of the study and as such, will be funded from the Downtown Vision Engagement Project budget, as previously allocated from the Tax Rate Stabilization Reserve Fund.

**Other Resource Impacts**

In addition to consultant costs, staff time will be allocated to the project in managing the contract and preparation of background data.

Communication Matters:

**Consultation in the Preparation of the Terms of Reference**

Consultation with the Downtown Task Group occurred in the preparation of the proposed Study goals and key considerations. Input was addressed and incorporated into the subject Terms of Reference.
Consultation throughout the Study process

The public communication and engagement process as part of the broader Official Plan Review has been initiated and will be fully launched in early fall. The Commercial Strategy Study will directly link into the OPR engagement process rather than having parallel engagement strategies. However, the selected consultant will be expected to consult with key stakeholders, including with the two BIAs and the Downtown Task Group, during the preparation of the Study.

Further, the selected consultant would be expected to present the study findings and recommendations to a public meeting of the Community Development Committee. There is also a role for the consultant in public engagement as part of the Downtown Vision Engagement Project.

Following receipt of the consultant’s study, staff will prepare a commercial policy directions report, along with other policy issue-specific directions reports. The purpose of the commercial policy direction report is to bridge the consultant’s findings, and findings of the Downtown Task Group with potential policy changes; these reports present options and recommendations for consideration by the Community Development Committee/Council.

Conclusion:

Specialized assistance from a consulting group is required to undertake the Commercial Strategy Study for the City of Burlington as part of the Official Plan Review. The attached Terms of Reference outline the proposed scope of the study, and are proposed to be used to call for proposals from qualified consultants.

Respectfully submitted,

Andrea Smith, MCIP, RPP
Senior Planner – Policy

[Reviewed by: Alan Gummo – Manager of Policy and Research]
Appendices:

A. Appendix I – Official Plan Review Commercial Strategy Study
   Terms of Reference.

Notifications:
(after Council decision)

<table>
<thead>
<tr>
<th>Name</th>
<th>Mailing or E-mail Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brian Dean – BDBA on behalf of</td>
<td>See File</td>
</tr>
<tr>
<td>the Downtown Task Force.</td>
<td></td>
</tr>
</tbody>
</table>

Approvals:
*required

<table>
<thead>
<tr>
<th>*Department Head</th>
<th>City Treasurer</th>
<th>General Manager</th>
<th>City Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To be completed by the Clerks Department

<table>
<thead>
<tr>
<th>Committee Disposition &amp; Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>01-Approved 02-Not Approved 03-Amended 04-Referred 06-Received &amp; Filed 07-Withdrawn</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Council Disposition &amp; Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>01-Approved 02-Not Approved 03-Amended 04-Referred 06-Received &amp; Filed 07-Withdrawn</td>
</tr>
</tbody>
</table>

Notifications:
(after Council decision)

Name Mailing or E-mail Address
Brian Dean – BDBA on behalf of the Downtown Task Force. See File
Appendix I –

Official Plan Review Commercial Strategy Study

Terms of Reference

Part I: STUDY FRAMEWORK

A. Purpose of the Terms of Reference

The purpose of the Terms of Reference is to scope the area of review of the Official Plan Review (OPR) Commercial Strategy Study (Study) for the City of Burlington. The Terms of Reference are also intended to assist in the preparation of study proposals by candidate consulting firms.

B. Commercial Strategy Study Area

The Study area includes lands within the city’s urban area with focus on lands within the commercial and mixed use designations, and for components of the Study, include lands within the downtown (refer to Sketches Nos. 1 and 2).

C. Background and Context

The Commercial Strategy Study has been identified as a component of the 2012 Official Plan Review. The Planning Act mandates a review of a municipal official plan every five years which affords the opportunity to revisit policies and update as appropriate.

The emphasis of the current Official Plan Review is to develop policy that guides land use planning decisions in a planning context where intensification and infill rather than Greenfield is the primary form of development. And rather than focus on the creation of new neighbourhoods, the emphasis will be on refining existing ones. It is through this lens that the Commercial Strategy Study will be conducted.

An additional area of focus is on the downtown as this area is an integral component of the current commercial system in the city. It is also an area that has been identified as an Urban Growth Centre to meet intensification targets, and because of this, its commercial role within the city has the potential to redefine itself and evolve. Another consideration in carrying out the Study is to ensure alignment with provincial policy (e.g. Places to Grow and Provincial Policy Statement).

Also, the Commercial Study serves to address Strategic Plan directions regarding vibrant neighbourhoods and prosperity directions (e.g. create a strategy to redevelop aging retail
areas into mixed-use “people places”; encourage a vibrant and healthy mixed-use downtown; and create more mixed residential/commercial places within existing neighbourhoods).

D. Study Integration

The Commercial Strategy will be prepared as part of a series of Official Plan Review studies and direction reports, and link with the work of the Downtown Vision Community Engagement Project (also referred to as Core Commitment Update) which is currently underway. The purpose of the downtown project is to engage with the public and stakeholders, inclusive of the Downtown Task Group, to update the vision, principles and action plan regarding the health of the downtown.
PART II: THE STUDY

A. Study Purpose and Goals

The purpose of the Study is to obtain policy direction that incorporates commercial land use planning with neighbourhood planning and urban design. The focus is not only to ensure adequacy of commercial space, but also its integration within neighbourhoods and community facilities/infrastructure. The review will include both retail and service commercial uses.

Specifically, the fundamental inquiries of the Study are:

1. What are the national, provincial, regional and local market conditions and lifestyle trends that are likely to influence the amount, location, design, form and function of commercial development to 2031, within the city and within the downtown?

2. How adequate is the existing commercial policy framework positioned to address current and projected demand in the context of expected trends, in the city and the downtown?

3. How should the current policy framework be modified to serve the city’s and downtown’s land needs over the planning period to 2031?

4. How is the existing supply of commercial lands and floor areas to accommodate current and future retail and service commercial needs to 2031, within the city and the downtown?

5. What is the growth potential of commercial activity in the downtown given that a portion of the downtown mixed use centre is designated as an Urban Growth Centre?

6. Given downtown’s size, location and competitive environment, what role should it play in the commercial hierarchy? Is its highest potential as a regional, city-wide, or neighbourhood destination, or some combination thereof?

7. What steps can the city take to facilitate the successful integration of commercial areas within neighbourhoods to implement the Strategic Plan with respect to Vibrant Neighbourhoods and Prosperity directions?

8. What steps can the city take to facilitate the development, redevelopment, revitalization and intensification of commercial lands within nodes and corridors, and within mobility hub areas, so as to:

   • incorporate good principles of urban design and sustainability;
• make efficient use of hard infrastructure;
• accommodate co-location with community facilities/infrastructure; and
• integrate commercial lands within a neighbourhood.

9. How should the policy framework be modified to align with upper tier policy (e.g. Provincial Policy Statement and Places to Grow)?

10. What information does the city need to track in order to monitor commercial activity in the city and the downtown?

11. What mechanisms can be used to assist in the implementation of the commercial land use objectives (e.g. programs and partnerships)?

B. Study Process

The Study is anticipated to progress through three (3) phases, as illustrated on Appendix A – Phasing Chart – Official Plan Review Commercial Strategy Study. The phases are:

• Phase I: Data Collection and Analysis;
• Phase II: Formulation of Policy Directions and Design Recommendations; and;
• Phase III: Preparation of Urban Design Guidelines.

The key deliverables within:

• Phase I are the Commercial Market Demand and Supply Background Report, Commercial Policy and Design Review and Background Report, Interim Commercial Strategy Discussion Paper on the Downtown;
• Phase II is the Strategic Commercial Land Use Recommendations Report; and
• Phase III are the Urban Design Guidelines (Generic guidelines for the redevelopment of commercial lands within commercial nodes and corridors).

Staff reports will be prepared at the conclusion of each phase. Specifically, the following reports will be prepared:

• Information report on the findings of the data collection and analysis phase.
• Recommendation report regarding the consultant’s report on strategic commercial land use recommendations.
• Recommendation report regarding the Urban Design Guidelines.

Also, there will be key public communication and engagement activities that correspond with each study phase and each Committee/Council meeting. It is important to note that the public engagement activity serves to not only to provide input into the Commercial
Strategy Study, but also serves to link to the broader engagement strategy of the Official Plan Review and the Downtown Vision Engagement Project.

C. Study Scope

Table No. 1 below outlines the scope of review and identifies key tasks to be addressed within the Study phases. Tasks identified by asterisk (*) are to be priced separately.

Table No. 1: Scope of Review and Key Tasks by Study Phase

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Market Demand and Supply Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Inventory the location, type and amount of commercial development that currently exists in each of the commercial designations within the city of Burlington, and within the downtown.</td>
</tr>
<tr>
<td>2</td>
<td>Identify locations available for potential development, redevelopment, revitalization and intensification.</td>
</tr>
<tr>
<td>3</td>
<td>Review the population projections and demographic characteristics and consumer trends to determine how they will affect the market for commercial development in the city, and the downtown.</td>
</tr>
<tr>
<td>4</td>
<td>Identify market conditions and lifestyle trends that are likely to influence the amount, location, function and form of commercial development in the city, and the downtown.</td>
</tr>
<tr>
<td>5</td>
<td>Identify future market growth/potential of the downtown.</td>
</tr>
<tr>
<td>6</td>
<td>Identify trade areas of the city.</td>
</tr>
<tr>
<td>7</td>
<td>Identify primary, secondary and tertiary trade areas of the downtown by business sectors.*</td>
</tr>
<tr>
<td>8</td>
<td>Provide primary and secondary research of customer profiles and shopping patterns in the city and downtown.*</td>
</tr>
<tr>
<td>9</td>
<td>Identify location and regional competitive environment of the downtown.*</td>
</tr>
<tr>
<td>10</td>
<td>Identify short and mid-term market opportunities for the downtown.*</td>
</tr>
</tbody>
</table>

Policy and Design Considerations

11 Conduct a best practices/literature review of the commercial industry and land use
<table>
<thead>
<tr>
<th></th>
<th>Planning examples, to highlight considerations in policy development.</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Review all relevant background studies, reports and materials identified in Part III, Sec. 10 and summarize any relevant implications to current Study.</td>
</tr>
<tr>
<td>13</td>
<td>Review relevant Official Plan Amendment applications over the last 10 years as identified in Part III, Sec. 10 of the Terms of Reference.</td>
</tr>
<tr>
<td>14</td>
<td>Review key relevant Ontario Municipal Board decisions to highlight considerations in policy development.</td>
</tr>
<tr>
<td>15</td>
<td>Review all relevant background documents including items identified in Part III, Section 11.0 of the Terms of Reference.</td>
</tr>
<tr>
<td>16</td>
<td>Review parcel and unit size of retail commercial uses in the downtown to determine viability and level of flexibility to accommodate retail potential.</td>
</tr>
<tr>
<td>17</td>
<td>Identify appropriate type and amount of commercial uses related to mobility hub areas.</td>
</tr>
<tr>
<td>18</td>
<td>Identify under-serviced areas within neighbourhoods from an active transportation perspective.</td>
</tr>
<tr>
<td>19</td>
<td>Identify the common issues in a downtown that warrant discussion as part of the public engagement strategy for the Downtown Vision Engagement Project.</td>
</tr>
<tr>
<td>20</td>
<td>Review the existing commercial land use designations to determine if any updates to the commercial hierarchy are required.</td>
</tr>
<tr>
<td>21</td>
<td>Review existing policy and regulatory framework to identify opportunities that address and/or clarify form, function, and location of the various designations in the hierarchy and clarify related definitions.</td>
</tr>
<tr>
<td>22</td>
<td>Review existing policy framework to clarify conversions to and from commercial land use designations.</td>
</tr>
</tbody>
</table>
Table 1: Cont’d

**Phase II: Formulation of Policy Directions and Design Recommendations**

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>23</td>
<td>Provide direction on the downtown boundary from the perspective of a commercial node.</td>
</tr>
<tr>
<td>24</td>
<td>Identify any implications on commercial land use planning resulting from the provincial planning context.</td>
</tr>
<tr>
<td>25</td>
<td>Formulate a policy framework that will more clearly articulate the strategic direction relating to building form, scale, design, and the integration of commercial development with the surrounding urban fabric.</td>
</tr>
<tr>
<td>26</td>
<td>Identify commercial precincts in the downtown to enable policy development.</td>
</tr>
<tr>
<td>27</td>
<td>Identify directions to amend the Official Plan and Zoning By-law.</td>
</tr>
<tr>
<td>28</td>
<td>Identify key variables to be included as part of the land monitoring program city-wide and downtown.</td>
</tr>
<tr>
<td>29</td>
<td>Provide direction on municipal tool kits or potential partnership strategies that would assist in implementing the vision for commercial lands for the city and the downtown.</td>
</tr>
<tr>
<td>30</td>
<td>Identify design elements that would provide development that promotes convenient access by pedestrians and public transit service, high quality design elements, sustainable building elements, integration with existing neighbourhoods, mixed use buildings including live-work units, and other attractive or innovative forms of commercial development (excluding the downtown).</td>
</tr>
<tr>
<td>31</td>
<td>Identify design elements that support forms of commercial development that will be sensitive to existing streetscapes and related parking considerations, heritage properties, transit-oriented and pedestrian-oriented activities (excluding the downtown).</td>
</tr>
<tr>
<td>32</td>
<td>Identify design elements that support new commercial developments, as well as address redevelopment and intensification of existing commercial developments (excluding the downtown).</td>
</tr>
<tr>
<td>33</td>
<td>Provide direction on how to strengthen the relationship between commercial areas and community facilities/infrastructure.</td>
</tr>
<tr>
<td>34</td>
<td>Identify implications of the current inventory to emerging Greenfield development.</td>
</tr>
</tbody>
</table>
### Phase III: Urban Design Guidelines

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>35</td>
<td>Prepare generic urban design guidelines to address the redevelopment of existing commercial lands located within nodes and corridors (excluding regional shopping malls).</td>
</tr>
<tr>
<td>36</td>
<td>Provide direction where site-specific design guidelines may be warranted.</td>
</tr>
<tr>
<td>37</td>
<td>Formulate an implementation strategy that establishes development application criteria to achieve the urban design objectives, and that identifies the roles that the public and private sector can have in the implementation.</td>
</tr>
</tbody>
</table>
PART III – STUDY ORGANIZATION

1.0 Project Management

The Commercial Strategy Study is to be undertaken by a consulting group with the assistance of city staff. The Manager of Policy and Research is responsible for monitoring the work, and Senior Planner will act as Project Manager responsible for managing data requirements to the consultant of the project, ensure linkages with the Downtown Vision Engagement Project and the broader Official Plan Review public communication and engagement process.

2.0 Steering Committee

A Steering Committee consisting of city staff including a Special Business Area Co-ordinator, Coordinator of Site Plans and Urban Design and Senior Planner - Policy, in addition to the consultant. It is expected that the Steering Committee will meet as follows:

- To initiate the Study to review detailed workplan, and specific data requirements
- Review results of the background analysis
- Review the draft Interim Commercial Strategy Discussion Paper
- Review draft strategic commercial land use recommendations report
- Review the draft urban design guidelines

3.0 Committee/Council Consideration

Staff reports will be prepared for the consideration of Committee/Council as part of the completion of:

- Phase I - Data Collection and Analysis;
- Phase II - Formulation of Policy Directions and Design Recommendations;
- Phase III - Preparation of Urban Design Guidelines for Commercial Lands; and
- OPR Direction Report on Commercial Lands

The Consultants will be expected to attend the Committee meetings at the completion of the three phases.

4.0 Public Consultation

As part of the proposal submission, the Consultant shall provide a plan for the project, which should include consultation with specific stakeholder groups and the public. The proposal should specify, the number, type and purpose of engagement techniques with associated costs. With respect to the downtown, the proposal should include an optional public forum, to be
defined by the proponent, designed to inform and generate discussion on the importance of
downtowns in the commercial hierarchy of the city, and the best opportunities for a healthy
downtown. The public forum is to be conducted as part of Phase I and in the preparation of the

The role of the Consultant is to attend the public consultation events. The role of staff is to plan
and implement the events.

5.0 Ontario Municipal Board

It is expected that the consultant would be in a position to defend the reports, including
methodology and findings before the Ontario Municipal Board, or other tribunal if needed.
Arrangements for such work would be under separate contract based on per diem rates.

6.0 Product Deliverables

The key deliverables include:

1. **Commercial Market Demand and Supply Background Report**, which provides a statistical
   summary of the supply of and future demand for commercial facilities in the city, including
   the downtown.

2. **Commercial Policy and Design Review Background Report**, which examines the existing
   commercial hierarchy, Official Plan policies and commercial development design guidelines
to determine how well the existing policy framework addresses the current, and future
   commercial needs of the city.

3. **Interim Commercial Strategy Discussion Paper on the Downtown**, which provides a
   summary of preliminary findings of the market potential of the downtown, its role in the
   commercial hierarchy, and preliminary strategic land use and policy framework findings.
The purpose of the Interim Paper is to provide key data to the Downtown Task Group that
would: enable the Task Group to proceed with “informed consultation” (getting information
so that it may be conveyed to stakeholders and the community enabling meaningful
conversations about the Downtown); raise insightful considerations to facilitate public
communication and engagement; and to explore strategic options to address the vibrancy
of the downtown that are grounded in reality.

4. **Strategic Commercial Policy and Design Recommendations Report**, which builds on the
   analysis conducted in Phase I of the Study to formulate policy and urban design
   recommendations, and that propose recommendations addressing the key goals as
   identified in Section A, Part I of the subject Study Terms of Reference.
5. **Urban Design Guidelines for Commercial Lands**, which provides generic guidelines for the development, redevelopment and revitalization of commercial lands in the city (excluding the downtown).

### 7.0 Proposal Costing

**Costing by Phase**
The Consultant shall provide a costing breakdown of each Phase. Costing breakdown should also be included for the proposed public engagement components and for the tasks identified Table No. 1 for the Downtown Task Group. The consultants work program may be subject to additions or modifications by the City of Burlington. The consultant should include hourly rates for additional work.

**Costing of Deliverables**
The proposal cost shall include three (3) copies of each of the documents inclusive of any maps and attachments. The three (3) copies shall be provided by the consultant, along with the letter of transmittal and the following:

- One (1) master copy of each of the five (5) documents, along with any maps or appended documents, unbound and suitable for reproduction purposes (note: any colour images must reproducible in black and white);
- One (1) copy of each of the five (5) documents in digital form on compact disc (CD) (Note: the document must be provided in a single document in .pdf and be Webready).
- One (1) copy of the supporting analytical or tabulated data in digital form on compact disc (CD) in MS Excel.

**Costing of Meetings**
The proposal cost should include a breakdown of costs for the following meetings:

- Downtown Task Group Meeting regarding the Interim Discussion Paper
- Committee meeting in Phase 1
- Potential public engagement event in association with Downtown Task Group
- Committee meeting in Phase 2
- Committee meeting in Phase 3
- Each of the five (5) steering committee meetings identified above.

### 8.0 Study Timing and Phasing

It is intended that the Study commence during the summer of 2012. The Interim Commercial strategy discussion paper is required by October 1, 2012. The balance of Phase I is to be completed by the end of Q4. It is expected that Phase II will be completed by Q2 of 2013 and Phase III by Q3.
Recognizing that this is the general time frame and that earlier timeframes would be desirable, the consultant shall provide a detailed timetable showing the various study components, and a timetable for completion of the study products.

9.0 Invoicing

Upon invoicing the city for services/products rendered, the Consultant shall reference Table No. 1 in Part II, to identify which tasks have been completed.

10.0 Available Information

A variety of studies, reports and materials are relevant to the Commercial Study. More detailed sources of information may be identified once the study program, methodology and data needs have been established. Burlington will provide the selected consultant with:

- Staff reports regarding the Downtown Vision Engagement Project, Official Plan Review and relevant Official Plan Amendment applications regarding commercial land uses.
- Key Downtown Task Group meeting materials. (e.g. SWOT Analysis, public and stakeholder survey results)
- Downtown and BIA Benchmarking Study (2012)
- Cost of Doing Business in the Downtown (2012)
- Official Plan Review Employment Study (pending completion) (note: commercial uses in employment areas is the subject of review within this study)
- Official Plan Review Transportation Master Plan Study (Pending Completion)
- Official Plan (2008)
- Zoning By-law 2020, as amended.
- City of Burlington ESRI ArcGIS mapping and orthoimagery.
Sketch No. 1 –
Commercial Lands within the City of Burlington Urban Area

Legend

Urban Boundary

Commercial Lands (inclusive of the following land use designations:
Regional Commercial, Community Commercial, Employment Commercial, Neighbourhood Commercial, and All Mixed Use Designations)

Urban Growth Centre
Sketch No. 2 –

Study Area of the City of Burlington Downtown Area

Legend

- **Shaded Area**: Lands within the Downtown Area of the Commercial Strategy Study. (Includes lands within the Downtown Mixed Use Centre and lands located within the Urban Growth Centre.)
- **Dashed Line**: Urban Growth Centre

MAY 2012
Appendix A -

Phasing Chart – Official Plan Review Commercial Strategic Study

Phase I: Data Collection and Analysis
- Commercial Market Demand and Supply Background Report
- Commercial Policy and Design Review Background Report
- Interim Commercial Strategy Discussion Paper on the Downtown

Phase II: Formulation of Policy Directions and Design Recommendations
- Strategic Commercial Land Use Recommendations Report

Phase III: Preparation of Urban Design Guidelines
- Urban Design Guidelines

Council Meetings:
- Council Meeting Staff Information Report
- Council Meeting Staff Recommendation Report
- Council Meeting Staff Recommendation Report

Engagement Activity
- Engagement Activity
- Engagement Activity
- Engagement Activity