



The Corporation of the
Town of Milton
COUNCIL AGENDA

December 18, 2023, 7:00 p.m.

Town Hall

150 Mary Street, Milton, ON L9T 6Z5

This meeting will be held as a hybrid meeting with Members of Council having the opportunity to participate in-person at Town Hall or electronically. At this time, members of the public are encouraged to continue to view the meeting by watching the live stream.

Should you wish to delegate to a Council meeting please complete the online delegation form at <https://forms.milton.ca/Community/Delegate-Request-Application> by 12:00 p.m. (noon) two business days before the meeting is to be held.

	Pages
1. <u>MOMENT OF SILENT REFLECTION / O' CANADA / TRADITIONAL LAND ACKNOWLEDGEMENT</u>	
2. <u>AGENDA ANNOUNCEMENTS / AMENDMENTS</u>	
3. <u>DISCLOSURE OF PECUNIARY INTEREST & GENERAL NATURE THEREOF</u>	
4. <u>CONSENT ITEMS</u>	
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4.2 Minutes of the Council Workshop held on November 27, 2023	14
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4.4 Housekeeping Updates to Records Retention By-Law THAT the necessary by-law, included on the December 18, 2023 Council Meeting agenda, be considered for approval.	22
4.5 Trafalgar and Agerton Master Environmental Servicing Plan - Budget Increase, Funding Agreement and Contract Increase THAT Council approve a budget increase of \$338,127 (inclusive of HST) for the Trafalgar and Agerton Master Environmental Servicing Plan (MESP) funded by the Milton P4 Trafalgar Landowners Group; AND THAT the Mayor and Town Clerk be authorized to execute a funding agreement between the Town and the Milton P4 Trafalgar	66

Landowners Group for the Trafalgar and Agerton MESP budget increase;

AND THAT the Commissioner of Development Services be given delegated authority to negotiate a draft funding agreement prior to execution; subject to the satisfaction of the Chief Financial Officer/Treasurer and the Town's legal counsel;

AND THAT upon execution of the funding agreement, Council authorize a contract increase of \$261,981.90 (exclusive of HST) to WSP for the completion of the Trafalgar and Agerton MESP;

AND THAT the Manager, Purchasing and Supply Chain Management be authorized to execute the contract changes, as outlined by the purchasing by-law.

4.6 Recommendation Report - Notice of Intention to Designate - 94 Victoria Street - Jane McCann House

71

THAT Staff Report DS-063-23 entitled: "Notice of Intention to Designate - 94 Victoria Street - Jane McCann House be received;

THAT Milton Council recognizes the historic house at 94 Victoria Street in the Town of Milton as being of heritage significance;

THAT Milton Council designate the property under Part IV of the Ontario Heritage Act, R.S.O. 1990, c. O.18 for the reasons outlined in the Reasons for Designation attached as Appendix 1 to this Report;

AND THAT the Town Clerk provides the Notice of Intention to Designate as outlined in Section 29 (4) of the Ontario Heritage Act;

AND FURTHER THAT once the thirty-day objection period has expired and if there are no objections, a designation by-law is brought forward for Council adoption.

4.7 Recommendation Report - Notice of Intention to Designate - 200 Martin Street - Walter Dickin House

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THAT Staff Report DS-064-23 entitled: "Notice of Intention to Designate - 200 Martin Street - Walter Dickin House be received;

THAT Milton Council recognizes the historic house at 200 Martin Street in the Town of Milton as being of heritage significance;

THAT Milton Council designate the property under Part IV of the Ontario Heritage Act, R.S.O. 1990, c. O.18 for the reasons outlined in the Reasons for Designation attached as Appendix 1 to this Report;

AND THAT the Town Clerk provides the Notice of Intention to Designate as outlined in Section 29 (4) of the Ontario Heritage Act;

AND FURTHER THAT once the thirty-day objection period has expired and if there are no objections, a designation by-law is brought forward for Council adoption.

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15. ADJOURNMENT



The Corporation of the
Town of Milton
COUNCIL MINUTES

November 13, 2023, 7:00 p.m.

Members Present: Mayor Krantz, Councillor Ali, Councillor Best, Councillor Challinor, Councillor Malboeuf, Councillor Tesser Derksen, Councillor Ijaz, Councillor Marshall, Councillor Khalqi

The Council for the Corporation of the Town of Milton met in regular session at 7:00 p.m. This meeting was held as a hybrid meeting with Members of Council having the opportunity to participate in-person at Town Hall or electronically.

1. **MOMENT OF SILENT REFLECTION / O' CANADA / TRADITIONAL LAND ACKNOWLEDGEMENT**
2. **AGENDA ANNOUNCEMENTS / AMENDMENTS**

The Town Clerk noted that on Friday, November 10, 2023, a revised agenda was posted to the Town website, which included reports relating to the Housing Accelerator Fund report, the 2023 Halton Region Allocation Program report, and the Purchasing Various report, under Items for Consideration.

In addition, two delegates were added and two written submissions were received with regards to Items for Consideration #8.1 We Make Milton – Growing in Milton Policy Considerations Report. The written submissions were circulated to all members of Council in advance of tonight's meeting.

Furthermore, the Town Clerk noted that later on in the agenda, there is one statutory public meeting scheduled with regard to a Zoning By-law Amendment application by 150 Steeles Inc., applicable to lands known municipally as 150 Steeles Ave East.

During the course of the live meeting, members of the public can speak in person, or they can connect via phone by dialing a dedicated phone number 1-

(866) 511-0021, or they can email townclerk@milton.ca, and they will be given instructions on how to enter and participate in the meeting via phone.

She also noted that these instructions will be provided again at the beginning of the public meeting. Information about how to connect will also be scrolling across the livestream video.

3. DISCLOSURE OF PECUNIARY INTEREST & GENERAL NATURE THEREOF

None

4. CONSENT ITEMS

At this point in the meeting, Mayor Krantz turned the Chair Position over to Acting Chair, Councillor Khalqi.

Res. 150-23

THAT Consent Items numbered 4.1 to 4.5 be approved.

Carried

4.1 Minutes of the Council Meeting held on October 23, 2023

4.2 Confidential Minutes of Council Meeting held on October 23, 2023

4.3 Streamlining Development Services Process Update

4.4 Notice of Intention to Designate 133, Mill Street - Eli Van Allen House

4.5 Notice of Intention to Designate 337, Oak Street - Alexander Murray House

5. DELEGATIONS

5.1 Presentations Item #7.1

Erin Westman and Areej Ghazal, Co-Chairs, Elsie MacGill Secondary School Community, addressed Council with respect to Staff Report DS-050-23.

5.2 Items for Consideration #8.1

Kim Bradshaw, Stop Sprawl Halton, addressed Council with respect to Staff Report DS-051-23.

5.3 Items for Consideration # 8.1

Marina Huissoon, Sustainable Milton, addressed Council with respect to Staff Report DS-051-23.

6. PUBLIC MEETING

6.1 Public Meeting and Initial Report: Zoning By-law Amendment Application by 150 Steeles Inc. applicable to lands known municipally as 150 Steeles Ave East (Town File: Z-06/23)

Jill Hogan, Commissioner, Development Services, and Jennifer Lawrence, Neatt Communities, representative for the applicant, addressed Council with respect to Staff Report DS-048-23.

As no members of the public came forward at this time, the Acting Chair closed the public meeting.

Res. 151-23

THAT Report DS-048-23, be received for information.

Carried

7. PRESENTATIONS

7.1 Supporting Safe Roads in Milton – 2023 Update

Res. 152-23

THAT staff implement four (4) 40km/h Neighbourhood Zones in the area bordered by Derry Road, Bronte Street South, Louis St. Laurent Avenue and Regional Road 25 within Ward 4;

THAT staff report back to Council in Q1 2024 with a detailed financial impact estimate and proposed implementation plan for the remaining proposed 40km/h Neighbourhood Zones along local and minor collector roads;

THAT Council approve a budget amendment in the amount of \$96,672 to capital project C40010223 - Traffic Infrastructure, funded from the Project Variance Account, for new School Zone Flashers along frontages of Secondary Schools on Arterial Roads;

AND THAT staff report back to Council in Q1 2024 with a detailed financial impact estimate and proposed implementation plan for the installation of raised crosswalks at school PXOs along Major Collector Roads.

Carried

8. ITEMS FOR CONSIDERATION

8.1 We Make Milton – Growing in Milton Policy Considerations Report

Res. 153-23

THAT Council receive Report DS-051-23 for information;

AND THAT the recommended policy considerations for the theme of Growing in Milton be endorsed by Council and that they be used to guide subsequent stages of We Make Milton.

Carried

8.2 Operating Budget Review – September 2023

Res. 154-23

THAT the operating report for the nine months ending September 2023 along with a projected year end deficit of \$123,523 be received for information.

Carried

8.3 Housing Accelerator Fund (HAF) - Update

Res. 155-20

1. **THAT** Council endorse the updated HAF Application, including the following five (5) additional initiatives as requested by the Federal Minister of Housing, Infrastructure and Communities, as outlined further in ES-011-23:
 - a. Permitting four units as-of-right city-wide;
 - b. Permitting four storeys as-of-right within 800 metres walking distance of Milton Transit lines;
 - c. Designate dedicated staff to implement an affordable housing strategy, which should involve liaising with non-market housing providers and other levels of government, guiding projects through the development and permitting process, and identifying lands for affordable nonmarket housing;

- d. Delegate decision-making power for minor re-zonings, as well as approvals for affordable housing and modular housing, to Town staff;
 - e. Create incentives to encourage the development of purpose-build rentals and non-market housing.
2. **THAT** the implementation of any of the five additional initiatives noted above be contingent on further Council approvals as outlined in the Supplemental Information that the Town provided for the HAF program (Attached herein as Appendix C).
 3. **THAT** the Commissioner of Development Services be authorized to make any further adjustments required to the Town of Milton's HAF Application.
 4. **THAT** the Mayor and Clerk be authorized to execute any agreements that are required in relation to the HAF funding program.

Carried

8.4 2023 Halton Region Allocation Program

Res. 156-23

THAT this report be received for information.

Carried

8.5 Purchasing Various – November 2023

Res. 157-23

THAT Council approve the budget amendments and related funding sources as outlined on Schedule A.

THAT the contract increase for absolute secure access client software to Rogers Communications Canada in the amount of \$88,709 (excl. HST) be approved as outlined on Schedule B.

THAT the contract increase for detailed design for Nipissing Road to WSP Canada Inc. in the amount of \$660,600 (excl. HST) be approved as outlined on Schedule C.

THAT staff be delegated the authority to approve change orders up to a total of 15% of the awarded value to WSP Canada Inc. in relation to the Nipissing Road reconstruction.

THAT the delegated authority to award the street light and pole condition assessment in the estimated amount of \$387,420 (excl. HST) be approved as outlined on Schedule D.

THAT the contract increase made under delegated authority for additional work required for the Fifth Line Grade Crossing and Widening to Canadian Pacific Railway Company in the amount of \$354,427 (excl. HST) be received for information as outlined in Schedule E.

THAT the contract increase made under delegated authority for Environmental Assessment of the Peru Road Bridge Removal and Cul-de-Sac Implementation to GM BluePlan Engineering Limited in the amount of \$9,080 (excl. HST) be received as outlined in Schedule F.

THAT the contract award made under delegated authority for Campbellville Road Guide Rail Upgrades to Powell Contracting Limited in the amount of \$1,266,870 (excl. HST) be received as outlined in Schedule G.

THAT the single source award made under delegated authority to conduct a Feasibility Study for the Milton Transit Garage to WSP Canada Limited in the amount of \$66,710 (excl. HST) be received as outlined in Schedule H.

THAT staff be delegated the authority to make a single source award to Pinchin Ltd. to undertake Asbestos Assessments for select Town facilities, and that details of the award be reported back to Council for information.

THAT the Manager, Purchasing and Supply Chain Management be authorized to execute the contract(s), as outlined by the purchasing by-law, and the Mayor and the Town Clerk be authorized to sign any required paperwork.

Carried

8.6 Notice of Motion - Tesser Derksen

Res. 158-23

WHEREAS, through its School Crossing Guards Policy, the Town of Milton currently uses specific warrants to determine the installing or

removal of crossing guards at pedestrian crosswalks, crossovers, and high pedestrian areas, such as intersections around schools;

AND WHEREAS, each year, there are incidents of vehicle-pedestrian collisions in school zones and on school walking routes, typically involving minors being struck by vehicles;

AND WHEREAS the removal of crossing guards pursuant to the current warrants may result in a reduction of safety for children and pedestrians in school zones and their immediate areas, and may result in a decrease in confidence that caregivers and students have in pedestrian safety;

AND WHEREAS the current warrants being used to determine the need for crossing guards at particular locations may not be adequate to meet the threshold for safety that our community expects and deserves;

THEREFORE BE IT RESOLVED THAT staff undertake a review of the Town's Placement of School Crossing Guards Policy and report back to Council in Q2 2024 with recommendations on a new warrant methodology for justifying placement of crossing guards at locations within school zones and in the immediate vicinity of school zones (such radius or vicinity to be included in the recommendations brought forward).

AND THEREFORE BE IT FURTHER RESOLVED THAT staff explore options for shared funding opportunities with school boards to help offset the costs of hiring additional crossing guards.

Carried

9. INTRODUCTION OF NOTICE OF MOTION

10. REGIONAL COUNCIL UPDATE

11. STATEMENT BY MEMBERS

12. CONFIDENTIAL SESSION

Council did not convene into confidential session and made the following resolutions in open session:

13. OPEN SESSION

Res. 159-23

THAT the recommendations contained in Staff Report DS-053-23 be approved.

Carried

Res. 160-23

THAT the recommendations contained in Staff Report CORS-055-23 be approved.

Carried

14. BY-LAWS

Res. 161-23

THAT By-law Numbers 088-2023 through to and including Bylaw 090-2023, be READ, PASSED AND NUMBERED;

AND THAT the Mayor and the Town Clerk be authorized to sign the said By-laws, seal them with the seal of the Corporation and that they be engrossed in the By-law Book.

Carried

14.1 088- 2023 Regulate and Prohibit the Sale and Discharge of Fireworks and Repeal By-law 037-2009

14.2 089-2023 General Signing By-law - November 13, 2023

14.3 090-2023 Confirm Proceedings By-law - November 13, 2023

15. ADJOURNMENT

There being no further business to discuss the Acting Chair adjourned the meeting at 9:18 p.m.

Gordon A. Krantz, Mayor

Meaghen Reid, Town Clerk



The Corporation of the
Town of Milton
COUNCIL WORKSHOP MINUTES

November 27, 2023, 7:00 p.m.

Members Present: Mayor Krantz, Councillor Ali, Councillor Best, Councillor Challinor, Councillor Malboeuf, Councillor Tesser Derksen, Councillor Ijaz, Councillor Marshall

Members Absent: Councillor Khalqi

1. **Notice**

The Town Clerk advised that in accordance with the Town's Procedure By-law, "Workshop" means a meeting of Council where the purpose is for members of Council to discuss matters in an informal venue. She advised that no resolutions shall be passed at a workshop, with the exception of procedural motions.

2. **DISCLOSURE OF PECUNIARY INTEREST & GENERAL NATURE THEREOF**

None

3. **ITEMS**

3.1 **2024 Budget Workshop**

Glen Cowan, Chief Financial Officer and Treasurer presented to Council with respect to the 2024 Capital and Operating Budget. The following senior staff presented to Council with regard to their respective Departments and services: Andy Scott, Director of Strategic Initiatives, Troy McHarg, Commissioner of Corporate Services, Kristene Scott, Commissioner of Community Services, Jill Hogan, Commissioner of Development Services, Sarah Douglas-Murray, CEO / Chief Librarian, Milton Public Library and Monique Gaudet, Executive Director, DBIA.

4. **ADJOURNMENT**

There being no further business to discuss the Mayor adjourned the meeting at 9:22 p.m.



The Corporation of the
Town of Milton
COUNCIL MINUTES

December 4, 2023, 7:00 p.m.

Members Present: Mayor Krantz, Councillor Ali, Councillor Best, Councillor Challinor, Councillor Malboeuf, Councillor Tesser Derksen, Councillor Ijaz, Councillor Marshall, Councillor Khalqi

The Council for the Corporation of the Town of Milton met in regular session at 7:00 p.m. This meeting was held as a hybrid meeting with Members of Council having the opportunity to participate in-person at Town Hall or electronically.

1. **MOMENT OF SILENT REFLECTION / O' CANADA / TRADITIONAL LAND ACKNOWLEDGEMENT**

2. **AGENDA ANNOUNCEMENTS / AMENDMENTS**

The Town Clerk noted that on Friday, December 1, 2023, a revised agenda was posted to the Town website, which included the addition of two delegates and one written submission, with regards to Staff Report CORS-057-23, 2024 Capital and Operating Budget. The written submission was circulated to all members of Council in advance of tonight's meeting.

The Town Clerk further noted that one of the delegates has withdrawn his delegation request.

Glen Cowan, Chief Financial Officer & Treasure, Corporate Services, informed Council that all remaining feedback from the Lets Talk Milton page, along with all of the questions and responses have been distributed to Council.

3. **DISCLOSURE OF PECUNIARY INTEREST & GENERAL NATURE THEREOF**

3.1 Councillor Best - 2024 Capital and Operating Budget Clause 4b

Councillor Best disclosed a pecuniary interest on Item 4b of the recommendation from CORS-057-23, 2024 Capital and Operating Budget, Section 5.1 of

Presentations, with respect to the 2024 Operating budget for Seniors Programs Part Time Salaries and Benefits as his wife is employed there as an instructor.

4. DELEGATIONS

4.1 Presentation Item #5.1

Marshall Horner addressed Council with respect to Staff Report CORS-057-23.

5. PRESENTATIONS

5.1 2024 Capital and Operating Budget

Res. 161-23

THAT a new capital project be added to the 2024 Budget for a Stop Sign Beacon Pilot Project, with a funding of \$72,512 provided from the Studies and Other Non Growth Capital Reserve, and that the Pilot provide for the installation at one all way stop intersection per ward in 2024.

Carried

Res. 162-23

THAT a Senior Transportation Planning Technologist (1.0 FTE) be added to the 2024 Operating Budget with funding from the tax levy of \$155,055.

Opposed (4): Gordon A. Krantz, Councillor Challinor, Councillor Malboeuf, and Councillor Ijaz

Carried (5 to 4)

Res. 163-23

THAT a Platoon Chief (1.0 FTE) be added to the 2024 Operating Budget with funding from the tax levy of \$186,723.

Opposed (2): Gordon A. Krantz, and Councillor Challinor

Carried (7 to 2)

Res. 164-23

THAT the transfer from the Tax Stabilization Reserve to the 2024 Operating Budget be reduced by \$750,000 with an equivalent increase in the net tax levy in order to fund the related on-going expenses.

Lost

Res. 165-23

WHEREAS the proposed Town of Milton 2024 Property Tax Increase, when blended with the Regional Municipality of Halton and school boards' 2024 operating budgets, will net out at 5.37 percent, if the Region and school boards' budgets are approved, as is;

AND WHEREAS the proposed 2024 Town of Milton Property Tax Increase, when blended with the Regional Municipality of Halton, school boards and proposed Halton Regional Police Service's operating budgets, could net out at about 5.78 percent if they are approved, as proposed;

AND WHEREAS Milton is in economic recession, interest rates are high, food inflation is continuing unabated and an increasing number of Miltonians are defaulting on their mortgages and not paying their property taxes;

THEREFORE, BE IT RESOLVED THAT in order to provide financial relief to hard-hit Milton families, the Town of Milton 2024 operating budget achieve a 5.0 percent blended property tax rate objective;

AND FURTHER, BE IT RESOLVED THAT the \$36 million purchased goods and services line items in the 2024 Town of Milton Operating Budget be reduced in order to achieve a 5 percent blended tax rate total (requiring an estimated reduction of \$825,000 to \$1,770,000 depending on the final budgets established for Halton Region and the Halton Regional Police Service).

Lost

Res. 166-23

THAT staff be directed to prepare a report for Council that outlines alternatives for a multi-year financial strategy for the Town that can be used as a basis to guide future budget processes.

AND THAT a Council Workshop to discuss the alternatives be held in advance of the presentation of the report to Council.

AND THAT the staff report be presented to Council for consideration no later than June 2024.

AND, FINALLY, that an annual financial workshop occur in June or July to discuss pertinent financial information as well as facilitate pre-budget discussions

Carried

Res. 167-23

1. THAT the 2024 Capital Budget with a gross amount of \$83,732,615 as outlined in Appendix 2 and the 2025-2033 Capital Forecast with a gross amount of \$1,369,298,807 as outlined in Appendix 3 of this report be received for review and any amendments made by Council;

2. THAT in accordance with s.s. 5(1) of the Development Charges Act, 1997 and S. 5 of Ontario Regulation 82/98, it is Council's clear intention that any eligible excess capacity provided by the 2024 Capital Program will be paid for by future development charges;

3. THAT any donations, grants or subsidies applied in the 2024 capital program to projects with development charges funding are to offset the non-growth related costs of those projects unless otherwise specified;

4a) THAT the 2024 Operating Budget for Town and Library resulting in a net tax levy of \$98,923,879 assuming 2.29% net assessment growth, as outlined on Appendix 4 of this report save and except the portion of the Seniors Programs Salaries and Benefits, be received for review and any amendments made by Council;

5. THAT, if the actual net taxable assessment growth is different than 2.29%, any increase in the tax dollars generated from the Town portion of assessment growth for 2024 taxation be transferred to the Tax Rate Stabilization Reserve or any decrease in tax dollars generated from the Town portion of assessment growth for 2024 taxation be funded from the Tax Rate Stabilization Reserve;

6. THAT the non-union salary range adjustment for 2024 be approved at a rate of 2.1%;

7. THAT the 2025-2026 operating forecast for the Town, including the Library, with a combined net increase in the tax levy of \$27.1 million as outlined in Appendix 5 of this report (or as potentially revised) be received;

8. THAT the transfers to and from Reserves and Reserve Funds within the 2024 Budget as outlined in Appendix 6 (or as potentially revised) be received;

9. THAT the Milton BIA budget in the gross amount of \$487,675 resulting in a net tax levy of \$270,990, as outlined in Appendix 7, be received for review and any amendments made by Council.

**This recommendation varies from the recommendation contained in Staff Report CORS-057-23.*

Carried

Res. 168-23

4b) THAT the 2024 Operating Budget for Seniors Programs Salaries and Benefits, in the amount of \$39,512, be received for review and any amendments made by Council;

**This recommendation varies from the recommendation contained in Staff Report CORS-057-23.*

Carried

Res. 169-23

THAT, for the purposes of the 2024 Budget, the 30-day period referred to in subsection (6) of Ontario Regulation 530/22 be shortened such that it is considered expired at the time of Council approval of this resolution on December 4, 2023.

Carried

6. ITEMS FOR CONSIDERATION

6.1 Ontario Regulation 284-09 – Report for 2024 Budget

Res. 170-23

THAT the compliance report for the expenses excluded from the 2024 budget outlined in report CORS-057-23 be approved as a requirement of Ontario Regulation 284-09 passed under the Municipal Act, 2001.

Carried

7. BY-LAWS

Res. 171-23

THAT By-law Number 091-2023 be READ, PASSED AND NUMBERED;

AND THAT the Mayor and the Town Clerk be authorized to sign the said By-law, seal it with the seal of the Corporation and that they be engrossed in the By-law Book.

Carried

7.1 091-2023 Confirm Proceedings By-law - December 4, 2023

8. ADJOURNMENT

There being no further business to discuss the Acting Chair adjourned the meeting at 8:56 p.m.

Gordon A. Krantz, Mayor

Meaghen Reid, Town Clerk



The Corporation of the Town of Milton

Report To: Council

From: Meaghen Reid, Director, Legislative & Legal Services/Town Clerk

Date: December 18, 2023

Report No: CORS-050-23

Subject: Housekeeping Updates to Records Retention By-Law

Recommendation: **THAT the necessary by-law, included on the December 18, 2023 Council Meeting agenda, be considered for approval.**

EXECUTIVE SUMMARY

The purpose of this report is to provide housekeeping updates to the Town's Records Retention By-law. These updates are required:

- for retention schedules to reflect recent changes to legislation;
- to ensure that Town's by-law aligns with records management practices for paper and digital copies of corporate records.

Staff recommend that Records Retention By-law 107-2019 be repealed and replaced with an updated Records Retention By-law, included within the December 18, 2023 Council Meeting agenda.

REPORT

Discussion

The Municipal Act, S.O. 2001, c. 25, as amended (the Act), requires local municipalities to retain and preserve records in a secure and accessible manner and grants municipalities the authority to establish records retention by-laws to govern their official records.

In 2019, Council adopted Record Retention By-law 107-2019, which was completed in accordance with applicable municipal legislation. Since that time, Town staff have reviewed this by-law and retention schedules. Staff have identified areas which require minor updates to reflect recent changes to legislation, current department procedures and records management best practices.

The following changes are incorporated within the proposed, updated Records Retention By-law:

- Incorporating record retentions based on the changes to Part VI.1 of the *Municipal Act, 2001*
- Updating the retention schedule for certain record classifications, as required by legislation, department procedures and best practices.



Discussion

Staff are recommending that an updated Records Retention By-law be approved to ensure that the current by-law incorporates business activities and that the Town continues to meet its requirements under the Municipal Act and other related legislation, such as the Municipal Freedom of Information and the Protection of Privacy Act (MFIPPA).

Financial Impact

Costs related to the access, management and retention of corporate records are budgeted within operating budgets for the Legislative and Legal Services Division.

Respectfully submitted,

Meaghen Reid
Director, Legislative & Legal Services/Town Clerk

For questions, please contact: Liz Harrison, Information Phone: Ext. 2112
 Governance and Records
 Manager

Attachments

n/a

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

A ADMINISTRATION (NON-FINANCIAL)

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
A00	Administration – General Includes administrative records which cannot be classified elsewhere including general correspondence, quarterly reports. Use only if no other heading is available.	Originating	1			
A01	Associations and Organizations Includes general correspondence, minutes, agenda, notices and reports regarding organizations and associations to which staff belong or with which they communicate in the course of their duties such as FCM, AMCTO, MISA, Ontario Farm Drainage Association, United Way, MMAH, GRCA, AMO, Chamber of Commerce, tag days, District School Boards, etc. Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence.	Originating	1	No	Only Release records that are already publically available	Excludes: Membership Fees - see F01
A02	Staff Committees and Meetings Includes records regarding the activities of staff committees and meetings. Includes notices of meetings, agenda, minutes, etc. May also include copies of staff activity reports.	Originating	4	No	Varies Depending on meeting topic, consult Legislative Services	Excludes: Council Minutes and Agenda - see C03-C04 Standing Committees – see C05-C06
A02-01	Management Team Committees and Meetings Includes records from management team committees and meetings such as minutes, decision or guidance documents affecting the entire Town’s operations. For example: Strategic Management Team (SMT) and Leadership Management Team (LMT) Meetings	Mayor and CAO Office	P	No	Varies Depending on meeting topic, consult Legislative Services	
A03	Computer/Information Systems Computer hardware and systems assisting staff with their daily duties. Includes computer hardware, computer software, data transmission, system design and implementation, quality control and office automation.	Information Technology	E+3 E=End life of the system	No	Mostly Accessible, some systems may be considered security related	Excludes: Reports - file by subject. Acquisitions – see F18 Purchase Orders & Requisitions – see F17
A04	Conferences and Seminars Includes invitations, approvals, agenda, notes on proceedings, and other records regarding conferences, conventions, seminars and special functions attended by staff, or sponsored by the municipality as well as travel arrangements, accommodation, itineraries, reservations, confirmation of reservations, hotel brochures related to the conference, restaurants, convention sites etc.	Originating	1	No	Yes	Excludes: Speeches and Presentations - see M08 Employee and Council Expenses - see F09 Ceremonies and Events - see M02 Invoices - see F01 Rental Agreements - see L14
A04-01	Conferences and Seminars hosted by Town of Milton Includes records for conferences, conventions, seminars and special functions hosted by Town of Milton	Originating	7	No	Yes	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
A05	Consultants Includes correspondence, proposals, resumes and other documents regarding the selection, appointment and monitoring of consultants. May include similar records regarding legal solicitors and engineering firms.	Originating	2	No	Only records after consultant contract completed are accessible	Excludes: Deliverables - file by subject. Quotations and Tenders - see F18 Invoices - see F01
A06	Inventory Control Includes inventory statements and reports, and all other records regarding the control of supplies, fuel and small equipment stock levels.	Originating	6	No	Yes	Excludes: Assets - see F06
A07	Office Equipment and Furniture Includes records regarding the design and maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, microfiche readers, etc.	Originating	E E=Disposal of asset	No	Yes	Excludes: Computer Hardware and Software - see A03. Service Agreements - see L14
A08	Office Services Includes records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, department mail logs, internal printing, and word-processing services.	Originating	1	No	Varies Depending on topic, consult Legislative Services	
A09	Policies and Procedures Includes departmental non-technical policy and procedure manuals, work instructions, protocols, guidelines and directives relating to administrative, governance and operational processes.	Originating	E+15 E=expiry date	No	Mostly accessible, procedures may be considered security related	
A09-01	Town Policy Manual Includes corporate policies that are approved by Council.	Mayor and CAO Office	P	No	Yes	
A09-02	Policies and Procedures Development Files Includes background files, key comments and feedback and legal opinion to form the policy or procedure.	Originating	E E=expired/revision	No	No	
A10	Records Management Includes information regarding the management of corporate records, regardless of medium. Specific records include file listings, feasibility studies, and records centre operations.	Legislative and Legal Services	E E= Updated	No	Mostly Accessible, some files may describe private documents	Excludes: Retention By-Law - see C01 Policies and Procedures - see A09

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
						Records Disposition - see A11 Training – see H12
A11	Records Inventory and Disposition Includes records regarding the inventory and disposition of municipal records (disposition means destruction, transfer or archive). Includes the disposal method used and forms authorizing and describing the destruction of records, file listings, classification structures etc.	Originating	P	No	Yes	
A12	Telecommunications Systems Includes records regarding all types of telecommunications systems. Includes telephone systems, facsimile machines, base and mobile stations, towers, antennae, police and fire communications systems, and 911 emergency systems.	Information Technology Fire	E E=Replacement of the system	No	No	Excludes: Licenses - see P09 Assets - see F06 Long Distance Call Records - see F01 Agreements - see L04 or L14
A13	Travel and Accommodation Includes records regarding travel and accommodation arrangements. Includes itineraries, maps, authorizations, reservations, rented vehicles and catalogues and brochures concerning hotels, convention sites and restaurants.	Originating	1	No	Mostly Accessible, may contain confidential payment information	Excludes: Employee and Council expenses – see F09
A14	Uniforms and Clothing Includes records regarding uniforms and special clothing used by municipal staff members, such as uniforms, firefighters' clothing and safety clothing.	Originating	E E=disposal of the item	No	No	
A15	Vendors and Suppliers Includes records regarding vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidders' information sheets.	Originating	3	No	Mostly not accessible, contains third party information	Excludes: Purchase Orders and Requisitions - see F17 Office Equipment - owned and leased - see A07 Fleet Management - see V01
A16	Intergovernmental Relations (Use only if no other headings are available) Includes correspondence and other records of a general nature regarding the relationship between the municipality and all other levels of government (such as telephone numbers, contact names, etc.). May include correspondence to and from Boards and Commissions. Where possible, these records should be filed by their	Originating	5	No	Varies Depending on topic, consult Legislative Services	Excludes: Risk Management Files - see L02

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	subject, not the originator or recipient of the report and/or correspondence.					
A17	Information Access And Privacy Includes records regarding the municipality's responsibilities under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) and records regarding the handling of requests under the Act. Includes routine disclosure requests and processing, notices of disclosure, responses to FOI request made to the municipality, access request transfers to another institution, FOI requests made by the municipality, notices of appeal and privacy breach investigation/remedy.	Legislative and Legal Services	E+2 E=close of the request/resolution of a breach	Yes	Limited correspondence and records release	Excludes: Policy – see A09 Training – see H12 IPC appeals/complaints – see L01
A18	Security Includes reports, requests, logs, and other records regarding the security of offices/facilities and properties such as security passes and control of keys.	Community Services Fire	5	No	No	Excludes: Vandalism Reports - see P05 Computer Security - see A24
A18-01	Closed-circuit television (CCTV) output for Surveillance (non –investigative related)	Community Services Fire	30 days	No	Requests for own personal information only	
A18-02	Closed-circuit television (CCTV) output for Surveillance (investigative related)	Community Services Fire	3	No	Requests for own personal information only	
A19	Facilities Construction and Renovations Includes records for the planning and construction of municipal facilities such as fire stations, pools, and office buildings. Includes site meetings, consultant's reports, and cost reports. Also includes architectural and engineering drawings.	Community Services	E+5 E=Completion of projects with no issues	No	Mostly accessible, except for building security information	Excludes: Specifications of the facilities – see A27
A20	Building and Property Maintenance Includes records regarding the maintenance of the municipality's buildings and properties, such as parks and trails, bus terminals, garages, libraries, and office buildings. Includes exterior maintenance to buildings, landscaping, grounds keeping and grass cutting. Also includes interior design of buildings, including floor layouts and office cleaning.	Community Services Engineering Services	5	No	Mostly accessible, except for building security information	Excludes: Recreational Facilities - see R05
A21	Facilities Bookings Includes copies of permits and bookings issued for the rental of recreational and administrative facilities for	Community Services	3	Yes	Restricted to your own personal booking or de-identified bookings	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	specific activities. Also includes any associated third party insurance policies.					
A22	<p>Accessibility of Buildings/Services</p> <p>Includes records relating to the accessibility of Town buildings, facilities, programs and services. Includes presentations, correspondence and planning.</p>	Legislative and Legal Services	P	No	Yes	Excludes: Facilities Construction & Renovations – see A19 Policies & Procedures – see A09
A23	<p>Information Systems Production Activity & Control</p> <p>Includes records relating to computer system operations and backup tapes. Includes activity logs, help desk tickets, change control sheets, change order, file access control reports and system changes.</p>	Information Technology	3	No	Varies by activity, limited to de-identified summary data on some topics	
A24	<p>Access Control and Passwords</p> <p>Includes records related to the management of and access to programs. Includes individual access, password management, etc.</p>	Information Technology	E E=revoke of access/change of password	No	No	
A25	<p>Performance Management/Quality Assurance</p> <p>Includes records regarding the performance of the municipality as a corporation such as service reviews. Types of records included would be reports, statistical analysis, program documentation, correspondence, awards for outstanding organizational achievements, work plans, etc.</p>	Mayor and CAO Office	P	No	Yes	Excludes: Employee performance appraisal – see H03 Council Goals & Objectives – see C08 Financial Regulatory reporting – see F27
A26	<p>Building Structure Systems</p> <p>Includes records regarding building systems that are part of the building structure such as HVAC, ventilation, fire and life systems, electrical safety, elevators, furnace, and emergency lighting. Includes manufacturer's operation/technical manuals and warranties; various inspection and testing reports; approved life safety studies, approved compliance equivalencies, inspection log books and remedial action for building systems.</p> <p>Note: Quality assurance logs, salt logs, pool readings, ice measurements, maintenance logs, first aid checks, fire extinguisher check, emergency light check, flood logs, refrigeration readings, alcohol event logs.</p>	Community Services	E E= End life of the system	No	No	
A27	<p>Drawings and Specifications</p> <p>Includes architectural and engineering drawings and As-Built drawings and supporting documentation such as specifications required to interpret the drawings and identify the current state of a facility or infrastructure for assessment, rehabilitation and warranty support purposes.</p>	Originating	E E= End life of the facility or infrastructure	No	No	

P – Permanent E - Event

C COUNCIL, BOARDS & BY-LAWS

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
C00	Council and By-Laws – General Includes records regarding Council, Boards and by-laws which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1	No	Yes	
C01	By-Laws Includes final versions of the municipality's by-laws and amendments and attachments that are legally part of the by-laws.	Legal and Legislative Services	P	No	Yes, must be made publically available	Excludes: Background information – see C01-01
C01-01	By-Law Background File Include any background and supporting documentation required to explain or justify the By-Law.	Originating	P	No	No	
C03	Council Meeting Agendas and Meeting Packages Council meeting packages including notice of meetings, agendas, delegates information and reports/ presentations as well as working notes used in agenda preparation.	Legal and Legislative Services	P	No	Yes, must be made publically available	
C04	Council Minutes Includes minutes of the proceedings of Council meetings. Includes attachments to the minutes.	Legal and Legislative Services	P	No	Yes, must be made publically available	Excludes: Standing Committees or Boards - see C05, C06 Reports to Council - see C11
C05	Council Committees/ Boards Meeting Agenda and Package Includes notices of meetings and agenda for the committees of Council as well as working notes used in agenda preparation, including both standing and advisory committees/Boards.	Originating	P	No	Yes, must be made publically available	
C06	Council Committee/ Boards Minutes Includes minutes of the committees of Council and copies of Local Board Minutes that members of Council belong to, including both standing and advisory committees/Boards.	Originating	P	No	Yes, must be made publically available	
C07	Elections Includes returned notices, lists of officials, initial MPAC and amended voters' lists, change of name applications, nominations, notices, election results, preliminary voters' lists, objections lists, candidate compliance reports, third party campaign financial and auditor reports, election report, election coordination documentation, oaths taken by council members and information on ward boundaries. Includes advertising.	Legal and Legislative Services	E E=Declaration of results for next election	Yes	Final results, reports, nomination papers, financial statements	Financial Statemts must be kept for 4 years after completion of next election

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
C07 – 01	Ballots and any other documents and materials related to the election. Including election ballots, voters lists. MEA Section 88	Legal and Legislative Services	E + 120 days E=declaration of results, if no recount	No	No	
C07-02	Ward Boundary Review Includes records related to electoral wards, including ward boundary reviews.	Legal and Legislative Services	P	No	Final reports must be made available	
C08	Goals and Objectives Includes records concerning strategic planning, goals and objectives, and mission statements.	Mayor and CAO Office	E+10 E= new goals and objectives	No	Final reports must be made available	
C09	Motions and Resolutions Includes final signed versions of resolutions and motions of Council.	Legal and Legislative Services	P	No	Yes, must be made publically available	
C11	Staff Reports to Council and Standing Committees Includes all final reports to Council and Standing Committees.	Legal and Legislative Services	P	No	Final reports must be made available	
C12	Appointments to Boards and Committees Includes records regarding appointments by Council of staff and council members.	Legal and Legislative Services	P	No	Yes, must be made publically available	
C13	Accountability Transparency & Governance Includes records relating to Council Code of Conduct complaints and related investigations, Integrity Officer appointments and reports (including Integrity Commissioner reports, Ombudsman investigations and reports), closed meeting investigations and initiatives etc.	Legal and Legislative Services	2	No	Commissioner Final Reports Only	
C14	Strong Mayor Powers and Duties Includes records documenting decisions/approvals, associated deliberations and directives to staff issued by the Mayor	Legal and Legislative Services	P	No	Only what is already publically available	

P – Permanent E - Event

D DEVELOPMENT & PLANNING

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
D00	Development and Planning - General Includes records regarding development and planning which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1	No	No	
D01	Demographic Studies Includes records regarding trends in population growth, census reports, and density studies. Also includes records regarding the type, level and rate of growth of employment, unemployment statistics, composition of the workforce, etc.	Planning and Development	10	No	Available once finalized	Excludes: Vital Statistics - see L12
D02	Economic Development Includes records regarding the growth of the economy. Includes studies, statistics, projections etc.	Economic Development	10	No	Available once finalized	Excludes: Demographic Studies - see D01 Residential Development - see D04 Tourism Development - see D06 Industrial/Commercial Development - see D21
D03	Environment Planning Includes records regarding general types of environmental studies with a long range planning emphasis, such as salt usage impact, storm drainage and flood control, parks and open spaces, water sustainability and conservation, pollution prevention and waste management planning. Also contains information on invasive species and source water protection such as risk assessments, well development and purging, risk management plans, site condition reports and information prepared for Phase One and Phase Two environmental assessments.	Planning and Development	15	No	Available once finalized	
D04	Residential Development Includes records about monitoring house supply and implementing regional planning policies.	Planning and Development	10	No	Available once finalized	
D05	Natural Resources Planning Includes records about implementing provincial/municipal planning authorities' planning policies for the management and preservation of forests and other natural features such as Niagara Escarpment Commission.	Planning and Development	10	No	Available once finalized	
D07	Condominium Plans Records regarding the pre-consultation and approval of plans of condominiums. Includes pre-consultation reports, signed draft plan, supporting consultants' reports, subdivision agreement, CDM Plan, and registered R	Planning and Development Engineering	P	No	Mostly accessible, except for building security information	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Plans, technical reports and other legal documents.	Services				
D07-01	Background information for condominium plans Background information regarding the pre-consultation and the approval of plans of condominiums. Includes correspondence, written comments, working notes, and any other background information.	Planning and Development Engineering Services	E E= Expiry of appeal period or OMB decision for final approval	No	Mostly accessible, except for building security information	
D08	Official Plans Includes the official plan and exemptions and amendments to the official plan. Also includes secondary plans and amendments, containing detailed objectives and policies concerning the planning, development, and redevelopment of specific planning districts.	Planning and Development	P	No	Yes	Excludes: Official Plan Amendment Applications - see D09 Background Reports – see D24
D09	Official Plan Amendment Applications Records regarding to the applications to amend the official plan or secondary plans, including applications, staff reports, the amendment, the by-law pertaining to the amendment, supporting consultants' reports, plans and drawings	Planning and Development	E+10 E=Final Decision or reflected in revised official plan	No	Yes	
D09-01	Background Information for Official Plan Amendment Applications Records regarding to the pre-consultation and applications of the official plan or secondary plan amendments including comments and feedbacks on the application, workings notes and any other background information.	Planning and Development	E E= Expiry of appeal period or when OMB renders a decision	No	No	
D10	Severances Records regarding the granting of severances to parcels of land including application for severance, planner's comments, original consent sketch, final decision (including OMB Order, if applicable), deposited R Plan, signed certificate of consent, registration details, registered common ownership agreement, supporting consultants' reports.	Planning and Development	P	No	Yes	
D10-01	Background Information for Severances Background records regarding the granting of severances to parcels of land including workings notes and any other background information.	Planning and Development	E E=land titles registration with no outstanding issues			
D11	Site Plan Control Records regarding to the approval for the provision of services to individual land sites including water, sewage	Planning and Development	P	No	Limited to information that does not endanger site security	Excludes: Site Plan Agreements - see

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	and utility approvals, as well as parking areas, drainage and driveways. Includes application form, executed site plan agreement, registration details, supporting consultants' reports, approved plans and drawings, as built plans, survey, photometric plan(s).	Engineering Services				L04
D11-01	Background Information for Site Plan Control Background records regarding the approval for the provision of services to individual land sites including general correspondences, workings notes and any other background information.	Planning and Development Engineering Services	E E= release of entire letter of credit	No	No	
D12	Subdivision Plans Includes records regarding the pre-consultation and the approval of plans of subdivisions (both residential and commercial / industrial). Includes schedule of approval, official notice of registration, conditions of draft plan, signed draft plan, supporting consultants' reports, subdivision agreement, M Plan, and registered R Plans, drawings, technical report.	Planning and Development Engineering Services	P	No	Limited to information that does not endanger sire security	Excludes: Subdivision Agreements – See L04
D12-01	Background Information for Subdivision Plans Records regarding to the pre-consultation and applications of the official plan or secondary plan amendments including general correspondence, written comments, working notes and background information.	Planning and Development Engineering Services	E E= Expiry of appeal period or when OMB renders a decision	No	Limited to information that does not endanger sire security	
D12-02	Assumption Folder Includes records regarding the design, approved/ as built drawings, Ministry of Environment (MOE) Environmental Compliance Approvals or Storm Water Management reports and Operations & Maintenance Manuals, maintenance and assumption package documentation.	Engineering Services	E+3 E=reconstruction of roads and ponds	No	Available once finalized	
D12-03	Lot Grading Siting's Approved individual residential grading plan	Engineering Services	P	No	Access to own personal file	
D13	Variance Applications Includes records regarding the pre-consultation and the granting of minor variances in land use including zoning applications from existing zoning regulations. Includes planner's comments, signed decision and final affidavit letter, undertakings or other items satisfying conditions or final letter confirming that conditions have been satisfied (if applicable).	Planning and Development Engineering Services	P	No	Access to own personal file	Excludes: Budget Variances - see F05 Part Lot Control Exemptions – see D28 Consent/Severances – see

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
D13-01	Background Information for Variance Applications Records regarding to the pre-consultation and the granting of minor variances in land use including zoning applications from existing zoning regulations, Includes general correspondence, written comments, working notes and background information.	Planning and Development Engineering Services	E+1 E= Expiry of appeal period or when OMB renders a decision	No	No	D10
D14	Zoning Records and standards regarding to the designation of zones for land use planning purposes and zoning applications for other municipalities. Includes amendments to Holding Provisions, Temporary Use and Interim Control By-laws bylaws, council reports, consultation public comments	Planning and Development	P	No	Yes	Excludes: Zoning By-laws – C01 Council Staff Reports – C11 Minor Variances - see D13
D14-01	Background Information for Zoning Records and standards regarding to the designation of zones for land use planning purposes and zoning applications for other municipalities. Includes general correspondence, written comments, working notes and background information.	Planning and Development	E E=Final decision	No	No	
D15	Easements Includes all records on Rights of Way and Easements concerning municipal ownership of private lands in order to maintain public service such as water and sewer lines that cross private property.	Planning and Development	P	No	Yes	Excludes: Original Agreements - see L04
D16	Encroachments Includes all records regarding private properties encroaching on municipal lands including encroachment permits. Also includes surveys and any other related documentation.	Engineering Services	P	No	Permits yes, surveys no	Excludes: Original Agreements – see L04 Original Encroachment By-Laws – see C01
D17	Annexation/Amalgamation Includes all records pertaining to the annexing and amalgamating of land adjacent to municipal lands to accommodate growth. May include studies on municipal restructuring.	Legislative and Legal Services Engineering Services	P	No	Yes	
D18	Community Improvement Projects Includes records, studies, statistics and any required background information on community development	Planning and Development	E+6 E=Completion of project	No	Available once finalized	Excludes Economic Development -

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	programs. Examples include Ontario Neighbourhood Improvement Programs, Community Area Improvement Programs, Community Gardens, BIA, BIC, PRID, etc. May also include records on housing rehabilitation programs, i.e. RRAP, CMHC					see D02
D19	Municipal Addressing Includes records regarding requests for and assignment of new subdivision and other street names and numbers. May include correspondence, reports, drawings, and copies of related by-laws	Planning and Development	E+10 E=Address no longer valid	No	Yes	
D20	Reference Plans Includes Registered Deposit (R Plans), site plans, property survey plans as received from Registry Office.	Planning and Development	P	No	Yes	Excludes Property Survey Plans - see Property/Roll file
D21	Industrial/Commercial/Infrastructure Development Includes records regarding promotion and development of industry and commerce. Records include studies, statistics, projections, monthly and quarterly reports, etc.	Planning and Development	10	No	Limited to information that does not endanger site security	Excludes Agricultural Development – see D23
D22	Digital Mapping Includes all records used to produce maps and updates in a digital format such as GIS.	Planning and Development Engineering Services	E E=data outdated	No	Limited to information that does not endanger site security	Excludes GIS system – see A03
D23	Agricultural Development Includes all records regarding development of agricultural growth.	Planning and Development	10	No	Available once finalized	
D24	Background Reports and Studies for Official Plan Includes reports pertaining to amendments and changes to the Official Plan. Includes all relevant planning and policy studies and guidelines such as Urban Design Guidelines, Technical Studies and Background Studies.	Planning and Development	P	No	No	
D25	Deeming Process Includes records regarding applications and background material for Deeming By-law applications, including Council decisions, by-laws, correspondence, etc. A Deeming By-law application is applied for in order to allow for two or more neighbouring lots on a registered plan of subdivision to merge. Only applicable to parcels of land contained within a plan of subdivision that has been registered for at least 8 years.	Planning and Development	E+ 2 E= Final Decision	Yes	Available once finalized	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
D26	<p>Development Charges Study</p> <p>Includes records related to the development of and the final Development Charges Study as required under the Development Charges Act. Includes advertising, public meeting notices, responses, stakeholder lists, public meeting information, background information and supporting documentation, consultant reports, notices regarding adoption of the Development Charges By-law, and other records related to requirements for the development of the Development Charges By-law.</p>	Finance	10	No	Yes	
D27	<p>Part Lot Control</p> <p>Includes records regarding applications for Part Lot Control exemptions, council decisions, by-law, correspondence, etc.</p> <p>A Part Lot Control application is applied for to allow the conveyance of a portion of a lot without requiring approval of a land division committee (typically used to separately convey semi-detached and townhouse units). Only applicable to parcels of land contained with a registered plan of subdivision.</p>	Planning and Development	E+ 5 E= Final Decision	No	Available once finalized	
D28	<p>Property Files</p> <p>Records relating to a specific property. Includes permits, inspections, agreements and drawings.</p>	Planning and Development	P	Yes	Limited to own personal information and does not endanger property security	
D30	<p>Marketing Partner Files</p> <p>Tourism and agricultural marketing partnership. Includes promotional materials, membership agreements.</p>	Planning and Development	10	No	Yes	

P – Permanent E - Event

E ENVIRONMENTAL SERVICES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
E00	Environmental Services Includes records regarding environmental services which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
E01	Sanitary Sewers Maintenance Includes records regarding the design, construction and maintenance of sanitary sewers.	Engineering Services	5	No	Limited to information that does not endanger system security	Excludes: Storm Sewers - see E02
E02	Storm Sewers Maintenance Includes records regarding the design notes, construction materials	Engineering Services	E+5 E= Completion of Project and no outstanding issues	No	Limited to information that does not endanger system security	
E02-01	Storm Sewer Specifications Includes as built drawings	Engineering Services	E E= Life of Asset	No	Limited to information that does not endanger system security	
E04	Trees/Forestry Includes woodlot management and records of tree removal, planting, trimming, pruning and preservation.	Engineering Services	5	No	Yes	
E06	Utilities Includes maps and location drawings provided to the municipality from utility companies such as telephone lines, gas mains, power lines, water mains etc.	Engineering Services	5	No	Limited to information that does not endanger system security	Excludes: Site Plans - see D11
E09	Drains Maintenance Includes records regarding the maintenance of drains (channel or pip) carrying surplus liquid such as rainwater or liquid waste, usually to a sewer. May include convenience copies of tenders, bylaws and grants.	Engineering Services	5	No	Limited to information that does not endanger system security	
E13	Water Monitoring Records regarding local monitoring for ponds and creeks. Including chemical samples, logs, reports, inspections.	Engineering Services	E+15 E=end life or retrofit of ponds and creeks	No	Limited to information that does not endanger system security	Excludes: By-Law Enforcement - see P01 Complaints and Inquiries - see M04
E17	Energy Management Includes all records relating to the municipality's Energy Management Program. Includes published annual energy	Community Services	E+7 E=plan updated/replaced	No	Yes	Excludes: Risk Management Files – see L02

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	plans, copies of utility invoices and consumption profiles, commodity procurement strategies, energy related feasibility studies, audit reports and retro-fit project files and reports and records pertaining to the benchmarking of energy cost and consumption and greenhouse gas emissions. Also includes conservation and demand measures information and management of energy consumption and conservation at municipal buildings and facilities.					
E24	<p>Gasoline Storage And Dispensing</p> <p>Includes gasoline storage tank and municipal gasoline dispensing records. Routine monitoring and dispensing records relate to loading and dispensing throughput volume; vapour control equipment operation, daily/weekly visual inspection/deficiency remedy actions and maintenance; Free Oil Layer and Separated Solid Layers Measurements and removal records measurements; tank bottom water removal; temporary tank removal; Loss of Product / Inventory Control and Reconciliation Records; excavation and nearby construction potentially affecting the storage tank system integrity; vapour barrier equipment downtime record; pumping equipment tests; pumping connection leak records; storage leak tests; gasoline levels measurement, and loss and gain records; and piping system pressure tests. System records relate to drawings and specifications for system; installation record; tank and piping systems locates; storage tank and Stage II vapour recovery system commissioning inspection and testing records; and storage tank component inspection reports and compliance documents (including warnings and notices of violations).</p>	Engineering Services	E+7 E=system no longer in use	No	Limited to information that does not endanger storage security	Excludes: Underground storage abandonment record – see L07

P – Permanent E - Event

F FINANCE & ACCOUNTING

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
F00	Finance and Accounting – General Includes records regarding finance and accounting which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
F00-01	Financial Studies Includes records relating to financial related studies such as user fees study, asset management planning study, or fiscal impact study.	Finance	E+7 E= study not in use	No	Available once finalized	
F01	Accounts Payable Includes records documenting funds payable by the municipality, such as paid receipts, copies of cheques issued to pay account, rebates, levies payable, reports, telephone bills, membership fees, employee and council expenses.	Finance	7	Yes	Limited access to own personal or business information	Excludes Cancelled Cheques – see F07 Employee and council expenses – see F09
F02	Accounts Receivable Includes records documenting funds owing to the municipality, such as invoices, billing listings, requests from mortgage companies and recoveries reports. Includes correspondence related to collection tax and supporting documentation. Includes credit card (VISA) information.	Finance	7	Yes	Limited access to own personal or business information	Excludes documentation and processes and Write-offs - see F23 Tax Assessments, Rolls and Tax Arrears - see F22 Property Tax Collection – see F22-01
F03	Audits Includes records regarding internal and external financial audits of accounts.	Finance	7	No	Available once finalized	Excludes Operation audits - see relevant subject. Audited Financial Statements - see F10
F04	Banking Includes records regarding banking transactions and relationships with banks. Includes bank reconciliations and deposit records.	Finance	7	Yes	Limited access to own personal or business information	Excludes Banking Statements - see F07
F05	Budgets and Estimates Includes departmental and corporate budgets, both capital and operating. Includes all working notes, calculations and background documentation. Also includes Budget Variances.	Finance	7	Yes	Available once finalized	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
F06	Assets Includes records regarding current and fixed assets. Includes inventories as well as records of initial expenditure, depreciation, amortization, and disposal.	Finance	E+10 E=disposal of asset	No	Available once finalized	Excludes Land Acquisition and Sale - see L07
F07	Cheques Includes all cancelled cheques issued. Also includes cheque requisitions, cheque listings, and supporting documents used to authorize issuance of cheques, N.S.F. cheques and bank statements	Finance	7	Yes	Limited access to own personal or business information	Excludes Banking - see F04 Property tax related cheques – see F22-01
F08	Debentures and Bonds Includes records regarding debentures and bonds issued. Includes information regarding the initial issuance of the debenture or bond as well as all records of payments made to investors.	Finance	E+7 E=Debentures surrendered for exchange/cancellation	Yes	Limited access to own personal or business information	Excludes Debenture Registers - F14
F09	Employee and Council Expenses Includes travel and meeting expense statements and all receipts submitted by employees or Council and Committee members to substantiate their claims. May include Credit Card information i.e. account numbers and statements etc. May also include employee time sheets combined with travel and expense statements. This is a separate file, organized by Name. Expenses could also be held under F01.	Finance	7	Yes	Mostly accessible with any personal information removed	Excludes Attendance - see H01 Honoraria and fees to Council – see F16
F10	Financial Statements Includes annual financial reports which includes but not limited to audited financial statements with accompanying notes, financial statement discussion and analysis, looking forward and statistics.	Finance	P	No	Yes	
F11	Grants and Loans Includes records regarding revenue generated in the form of grants-in-lieu, provincial and federal grants, loans, Community Fund and subsidies. Also includes submissions, acknowledgements, and reports.	Finance Originating	E+7 E=date of issuing the grants or repaying the loans	No	Mostly accessible, may contain economic interests. Consult Legislative Services	Excludes Risk Management Files – see L02
F12	Investments Includes records regarding the municipality's investments, term deposits, and promissory notes.	Finance	E+7 E=close of account	No	Mostly accessible, may contain economic interests. Consult Legislative Services	
F13	Journal Vouchers	Finance	7	Yes	Limited access to own personal or business	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.				information	
F14	Subsidiary Ledgers, Registers, and Journals Includes all subsidiary ledgers, registers, and Journals such as Payment and Receipt Journals, Payroll Registers, and Debenture Registers.	Finance	7	Yes	Limited access to own personal or business information	Excludes Documents and vouchers used to support entries - see relevant subject
F15	General Ledgers and Journals Includes all records in the Books of Original Entry.	Finance	P	No	Mostly accessible, may contain economic interests	
F16	Payroll Includes all records of payments of salary, wages and deductions to employees. Includes time sheets, pay lists, Blue Cross reconciliations, Canada Savings Bonds, T4 Slips and Statistics Canada reports. Also includes honoraria and fees to Council.	Finance	7	Yes	No	Excludes Payroll Registers - Subsidiary Ledgers, Registers and Journals - see F14
F17	Purchase Orders and Requisitions Includes purchase orders and requisitions, blanket orders, and all background documentation authorizing the procurement of goods and services.	Finance	E+7 E=expiry of contract	Yes	Finalized documents only, bid analysis no, only for own business	Excludes Quotations and Tenders - see F18
F18	Quotations And Tenders Includes records regarding quotations and tenders obtained from suppliers of goods and services. Includes Requests for Proposal, Invitations to Tender, Proposals, Tender Submissions, Pre-qualifications, and all documentation regarding the selection process	Finance	E+7 E=expiry of contract Unsuccessful Bid = 1	Yes	Finalized documents only, bid analysis no, only for own business	Excludes successful bids - see L04
F19	Receipts Includes receipts issued for payment of items such as licenses, rentals and taxes.	Finance	7	Yes	Limited access to own personal or business information	Excludes Property tax related receipts – See F22-01
F20	Reserves and Reserve Funds Includes records documenting obligatory and/or discretionary reserves or reserve funds such as reserves for working funds, contingencies, future capital projects, and information systems, etc.	Finance	7	No	Available when finalized	
F21	Revenues	Finance	7	No	Yes	Excludes

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes records regarding the generation of revenues other than taxes such as development charges and collected user fees authorized under User Fee Bylaw.		Mortgage related is 10			Accounts Receivable - see F02 Tax Rolls - see F22
F22	Tax Rolls and Records Includes taxation records of long term importance, such as assessment rolls, tax sale records, tax sale deeds, property tax registrations, tax arrears register cards and tax collector's rolls.	Finance	P	Yes	Limited access to own personal or business information	Excludes Correspondence related to tax issues that are not of a long term importance - see F22-01
F22-01	Property Tax-Administration Includes administrative documents and correspondences regarding to property tax related operations. Examples include but are not limited to: Lawyers letters indicating a sale or requesting tax status, tax certificates, Mortgage company requests, general ratepayer requests and resulting staff responses, Autopay Void Cheques, Images of payment cheques, Charity Rebate, Older Adult Deferral, Right of Way, Payment in Lieu, etc.	Finance	7	Yes	Limited access to own personal or business information	
F23	Write Offs Includes accounts receivable that have been written off as uncollectible. Also includes records of bankruptcies.	Finance	7	Yes	Limited access to own personal or business information	Excludes Accounts Receivable - see F02
F24	Trust Funds Includes records regarding funds established by the municipality for money held in trust, such as bequests, cemetery trust funds, cemetery care and maintenance programs, Homes for the Aged Residents (including authorization, receipts and statements of withdrawal) and Ontario Home Renewal Program such as fund accounting records, bank statements, banking instructions and fund audit records.	Finance	7	Yes	Limited access to own personal or business information	
F25	Security Deposit/Damage Deposits Includes development deposits, letters of credit, and proof of insurance when required and records of monies held as security (ie. bonds).	Finance	E+7 E=Closure of account	Yes	Limited access to own personal or business information	
F26	Working Papers-Financial Includes all working/meeting notes, calculations, reconciliations, end of year payment in lieu of taxes statements to school, and background documentation used to calculate financial statements such as the	Finance	E+1 E=Completion of audit	Yes	No	Excludes Financial Statements – see F10

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Monthly Trial Balance.					
F27	Regulatory Reporting – Financial Includes regulatory, financial information returns and government reporting such as HST returns, tax rebate filings, and the Ministry of Municipal Affairs Financial Information Return (FIR) and the Municipal Performance Measurement Program (MPMP) that collects municipal services data on an annual basis as a part of the FIR.	Finance	7	No	Varies, contact Legislative Services	

P – Permanent E - Event

H HUMAN RESOURCES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
H00	Human Resources – General Includes records regarding human resources which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
H01	Attendance and Scheduling Includes records regarding employee attendance, alternate work program, shift scheduling, vacation schedules, leave of absences, etc.	Originating	3	Yes	No	Excludes: Individual Time Sheets - see F16
H02	Benefits Program Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees, such as group insurance, dental plans, and general information on EHT.	Human Resources	E E=information outdated	No	Only what is publically available	Excludes: Payroll - see F16 Individual Pension and Benefit records – see H10
H03	Employee Records Includes records regarding the employment history of municipal employees. Includes initial resumes and applications, performance evaluations, legislative training records, correspondence with the employee, and employee assistance. Includes part-time, student employees and volunteers.	Human Resources Originating	E+7 E=Termination of employment/Volunteering	Yes	No	Excludes: Grievances – see H14
H03-01	Employee Records-firefighters	Human Resources Fire	E+25 E=Termination of employment/ volunteering	Yes	No	
H04	Health and Safety Records regarding the occupational health and safety of staff. Includes Joint Health & Safety Committee (JHSC) meeting minutes, JHSC safety inspection records, regulatory inspection/audit/enforcement records and staff incident/accident reports, Also includes designated substances assessments and Workplace Safety & Insurance Board certificates.	Human Resources Originating	5	Yes	No	Excludes: Accidents of the Public - see P05 Lost-time reports and claims – see H13 Health and safety training development – see H12/H12-01 Employee training certificates - see H03/H03-01
H05	Human Resource Planning Includes records of succession planning, executive placement, retirement programs, staff turnover rates, annual hire/promotion targets, recruitment freezes, employment equity, performance management, and related records.	Human Resources	E+1 E=Plan no longer in use	No	No	Excludes: Employee Records - see H03

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
H06	Job Descriptions Includes job descriptions and specifications as well as background information used in their preparation or amendment.	Human Resources	E E=updated/replaced	No	Varies, consult Legislative services	
H07	Labour Relations Includes records regarding the relationship between labour and management. Includes collective bargaining, correspondence with unions and negotiations.	Human Resources	E+10 E=when contract is no longer active	No	No	Excludes: Collective Agreement – see L04
H08	Organization Design Includes records regarding reporting relationships, reorganization, organizational analysis, etc. Includes organization charts.	Human Resources	E+1 E=updated	No	Final Copy only	Excludes: Job Descriptions - see H06
H09	Salary Planning Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules. Also includes any reference material retained regarding issues related to pay equity and compliance.	Human Resources	5	No	No	Excludes: Employee Records - see H03
H10	Pension and Benefits Records Includes records detailing obligations to individuals under OMERS. Includes pension information of current and retired personnel, including registration/enrolment and records.	Human Resources	7	Yes	No	Excludes Deductions for pensions – see F16 General information on pension plans - see H02 Payments made to OMERS - see F01
H11	Recruitment Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions and unsuccessful applications.	Human Resources	1	Yes	Only what is publicly available	Excludes: successful applications – see H03
H12	Training Development Includes records regarding courses offered to employees, and information on career and professional development programs. Also includes development of course content or materials for specific courses.	Originating	3	Yes	No	Excludes: Employee training attendance or certificates - see H03 Road salt usage or drinking water or hazardous material use related training – see H12-01
H12-01	Training Development – Special	Originating	7	Yes	No	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Including drinking water training, salt use training and hazardous material use training and PTSD training etc.					
H13	Claims Includes medical records regarding claims to WSIB or insurance carriers for lost-time incidents, accidents, STD or LTD. Includes accident notice, accident report.	Human Resources	E + 3 E=Resolution of claim	Yes	No	Excludes: Non lost-time incidents - See H04 Self-insured STD – see H04
H13-01	Claims- Hazardous exposure claims Records related to claims for exposure to airborne Acrylonitrile, benzene, lead, mercury, silica, vinyl, chloride, arsenic, ethylene oxide or asbestos etc.	Human Resources Originating	E+40 E=Latest record made	Yes	No	
H14	Grievances Includes records dealing with grievance complaints filed against the Town such as the initial complaint, investigation, reports and final resolution including arbitration and arbitration awards.	Human Resources	E+10 E=resolution of claim	Yes	No	Excludes: Harassment & Violence – see H15
H15	Harassment and Violence Includes records dealing with harassment and/or violence complaints by or against employees of the municipality. It includes documents such as the initial complaint, investigation, reports and final resolution	Human Resources	E+3 E=resolution of complaint	Yes	No	Excludes Grievances – see H14 Abuse investigation records not involving staff – P08
H16	Criminal Background Checks Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers. Also includes annual Criminal Offence Declaration.	Human Resources	E +7 E = termination of employment	Yes	No	
H17	Employee Medical Records – Hazardous Materials Includes records of exposure to asbestos and other hazardous materials. Also includes serious incident and chemical exposure records for firefighters.	Human Resources	E+40 E=resolution of claim	Yes	No	
H18	Employee Medical Records Includes doctor's notes, correspondence, and health reports related to an employee's medical situation	Human Resources	E + 3 E=When STD/LTD claims are resolved	Yes	No	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
H19	<p>Disability Management</p> <p>Includes all records related to occupational and non-occupational injuries and illnesses. Also includes accommodation records related to permanent impairment under the Human Rights Code resulting in permanent accommodation.</p>	Human Resources	<p>E + 5</p> <p>E= day issued or earlier as may be specified by Commission</p>	Yes	No	
H21	<p>Employee Recognition</p> <p>Includes all records and correspondence related to employee awards and honours granted by the Municipality. Includes: organized employee events such as staff barbeques, retirement celebrations, service awards, recognition parties, etc.</p>	Human Resources	5	Yes	No	

P – Permanent E - Event

J JUSTICE

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
J00	Justice general Includes records regarding court affairs which cannot be classified elsewhere. Use only if no other heading is available.	Originating	4			
J01	Certificates Of Offence (Part I) Includes Part 1 Certificates of Offence excluding Accident and Careless Driving offences. Records identified as POA schedule # CD-4R1.	Legislative and Legal Services	E+ 2 E=completion	Yes	Own personal information	
J04	Court Dockets Includes registers of court activity including POA (trial) dockets, Fail To Respond (FTR) dockets and Walk In Guilty (WIG) dockets detailing case dispositions (completed dockets). Also includes statistics on court activities and disposition of fines.	Legislative and Legal Services	5	No	Consult Legislative Services	
J05	Transcripts & Records Of Court Proceedings Includes records of court proceedings and records relating to exhibit dispositions. Includes tapes and log books.	Legislative and Legal Services	7	Yes	Consult Legislative Services	
J07	Appeals & Transfers Includes records of appeals and of transfers to and from other Courts.	Legislative and Legal Services	7	Yes	Consult Legislative Services	Excludes Appeals & Hearings (Municipal) – L01
J09	Disclosure Includes information requested by individuals in preparation for court cases.	Legislative and Legal Services	7	Yes	No	

P – Permanent E - Event

L LEGAL AFFAIRS

Class Code	Secondary Heading	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
L00	Legal Affairs – General Includes records regarding legal affairs which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
L01	Appeals and Hearings Includes all transcripts and related documentation regarding appeals, hearings, and legal proceedings. Includes final judgments. Includes zoning appeals, official plan appeals, tax appeals, Local Planning Appeal Tribunal / Ontario Municipal Board appeals and Committee of Adjustment appeals. Also includes orders issued by regulatory bodies and boards.	Originating	P	Yes	No, if not otherwise publicly available	Excludes: Litigation - see L02-L03 Includes closed meeting investigator
L02	Claims Against the Municipality Includes all litigation made by other parties against the municipality.	Finance	E+7 E=resolution of claim and all its appeals or if minors are involved, minors reach age of majority whichever comes later	Yes	No	Excludes: Appeals and Hearings - see L01
L03	Claims By the Municipality Includes all litigation made against other parties by the municipality.	Finance	E+7 E=resolution of claim and all appeals	Yes	No	Excludes Appeals and Hearings - see L01
L04	Contracts and Agreements - Under By-law Includes all agreements entered into by the municipality which require a by-law for approval. Includes construction contracts, collective agreements, development front-ending agreements, and subdivision agreements. Also includes agreements regarding tax arrears payment extension, easements, encroachments, area ways, laneways and records transfer.	Legislative and Legal Services	P	Yes	Final contracts only	Excludes Office Equipment Maintenance Agreements - see L14 Contracts regarding Land - see L07 Insurance Policies - see L06 Line fence agreements – see P01
L04-01	Preparation/Negotiation Documentation Includes working notes, key correspondences, major drafts and related legal opinions.	Originating	15	Yes	No	
L04-02	Reporting and Administration	Originating	E+7 E=Expiry of Contract	Yes	No	

P – Permanent E - Event

Class Code	Secondary Heading	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes reports or updates which are required under certain contracts and/or agreements such as quarterly reports to landowners; preparation of quarterly/annual remittance to Trustees; or tracking of cash flow assistance etc... Also includes the tracking of developer liabilities established through an agreement. For example developers build parks, bridges or fund studies on Town's behalf and are reimbursed by the Town.					
L05	Insurance Appraisals Includes appraisals of municipal property for insurance purposes.	Finance	E + 15 E = New appraisal has been done	Yes	Consult Legislative Services	
L06	Insurance Policies Includes municipal insurance policy documents, such as vehicle, liability, theft, and fire insurance.	Finance	E+15 E=Expiry of policy	No	No	Excludes Employee Group Insurance - see H02 Third Party Contracts - see L04
L07	Land Acquisition and Sale Includes records regarding real estate transactions and conveyance of land such as lot sales, easements, road allowance closings whether through voluntary transactions or expropriation. Includes leases, deeds and expropriation plans, purchase letters and appraisals, and potential land acquisitions and sale.	Legislative and Legal Services Economic Development	E + 10 E=date of land disposition, expiration of lease, replacement of plans or studies	No	Varies, consult Legislative Services	
L08	Opinions and Briefs Includes copies of opinions and briefs prepared by the municipality's legal counsel on specific issues.	Originating	E E=no longer applicable	No	No	Excludes Files by subject –see subject categories
L12	Vital Statistics Includes registers of births, deaths and marriages.	Legislative and Legal Services	P	Yes	No	Excludes Population Statistics - see D01
L12-01	Marriage Licences Includes licence applications and supporting documents	Legislative and Legal Services	2	Yes	Access to your own personal information	
L12-02	Burial Permits Includes permit applications and supporting documents	Legislative and Legal Services	2	Yes	No	
L13	Prosecutions	Legislative and Legal Services	E+7 E=delivery of judgement	Yes	No	Excludes Bylaw Enforcement - see P01

P – Permanent E - Event

Class Code	Secondary Heading	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes records regarding prosecutions to enforce by-laws and federal and provincial legislation.					Appeals and Hearings - see L01
L14	Contracts and Agreements – Simple Includes contracts and agreements which do not require by-law approval, such as equipment rental and service contracts and vehicle lease and purchase agreements.	Originating	E+7 E= Expiry of contract	No	Varies, contact Legislative Services	

P – Permanent E - Event

M MEDIA & PUBLIC RELATIONS

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
M00	Media and Public Relations – General Includes records regarding media and public relations which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
M01	Advertising Includes records regarding public advertising in magazines, newspapers, radio, television, and transit.	Corporate Communications	1	No	Yes	Excludes: News Releases - see M06 Recruitment - see H11 Elections - see C07 Tenders or Bids – see F18
M02	Ceremonies and Events Includes records regarding the set-up and running of special events or ceremonies.	Mayor & CAO Offices	5	No	Yes	Excludes: Employee recognition events – see H21
M03	Charitable Campaigns/Fund Raising Includes records for the municipality, for municipality run programs or for other charitable organizations. This would include the United Way, Cancer Fund, community interest groups, etc.	Originating	1	No	Varies, Consult Legislative Services	Excludes: Receipts - see F19
M04	Complaints, Commendations and Inquiries Includes records regarding commendations, requests for information, and very general types of inquiries and general complaints. Also includes concerns about services offered by the municipality, inquiries about council proceedings and congratulatory letters.	Originating	5	Yes	Access to own personal information	Excludes: Freedom of Information Requests - see A17 Grievances or harassment/violence complaints by or against employees – see H14, H15 Employee recognition – see H21
M05	News Clippings Includes clippings from newspapers, information from journals and other printed media.	Corporate Communications	1	No	Publicly available	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
M06	News Releases Includes background notes and final versions of news releases issued. Includes messages for inclusion in special event programs.	Corporate Communications	1	No	Publically available	
M07	Publications Includes typed manuscripts, artwork, printed copies and related records regarding the publication of tourism information, trade shows, current events, industrial directories, business directories, and maps. May include annual reports of a non-financial nature, Community Service guides and newsletters.	Corporate Communications	E E=discontinued or replaced	No	Publically available	
M07-01	Major publications by municipality Publications records major events or development of the municipality for historical references and researches. Includes annual reports, destiny Milton.	Corporate Communications	P	No	Publically available	
M08	Speeches and Presentations Includes background notes and final versions of speeches, presentations and news conferences given by elected and non-elected officials.	Corporate Communications	3	No	Yes	Excludes: Media coverage of speeches/presentations - see M05 News Releases - see M06
M09	Visual Identity and Insignia Includes records regarding branding and the standards which apply to graphic designs as part of a Visual Identity Program. Includes trademarks, logo and letterhead design, signage, flags, vehicle identification, etc. Also includes records regarding corporation insignia and seals of office.	Corporate Communications	P	No	Final copies only	
M10	Website and Social Media Content Includes snapshots of website content and copies of web pages created by the municipality for general public use. Also includes information on social media sites such as Facebook & Twitter	Corporate Communications	E+2 E=updated or replaced	No	Yes	
M11	Public Relations and Public Awareness Includes outgoing letters of support, congratulations, greetings, honourable achievement awards, welcome letters, etc. Also includes issues regarding internal/external communications. Includes	Mayor and CAO Office Corporate Communications	5	No	Yes	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	programs designed for public awareness and engagement.					
M12	Intellectual Property Include certificates of copyright, applications for patents and trademark registration. Also includes monitoring and enforcement of authorized use of copyright, trademarks and patents including copyright use permission requests.	Corporate Communications	E+5 E= copyright, patent or trademark expired or last use	No	Yes	

P – Permanent E - Event

P PROTECTION & ENFORCEMENT SERVICES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
P00	Protection & Enforcement Services – General Includes records regarding protection and enforcement services which cannot be classified elsewhere. Use only if no other heading is available.	Legislative and Legal Services	1			
P01	By-law Enforcement Includes records of municipal efforts to enforce bylaws such as orders to comply, inspection reports, stop work orders, working notes, correspondence, exhibits, photographs etc. Also includes records regarding parking tickets and parking enforcement, occurrence reports.	Legislative and Legal Services	7	Yes	Limited to cumulative statistics and own orders or tickets	Excludes: Fire Inspections - see P07 Fire Marshal Investigations – see P08 Prosecutions - see L13
P02	Daily Occurrence Logs Includes logs maintained of daily occurrences by staff.	Legislative and Legal Services	5	No	Consult Legislative Services	
P02-01	Crew Cards/Log Sheets Includes records of work locations for Operations employees	Engineering Services	7	Yes	No	
P03	Emergency Planning Includes records regarding the planning and rehearsal of emergency measures	Fire	E E=plan replaced or updated	No	Only what is publically available	
P04	Hazardous Materials Includes information and reports on chemicals and substances that pose fire or environmental hazards such as PCBs, refrigerants and halocarbons, Also includes Material Safety Data Sheets (MSDS) and records dealing with toxic substances control, halocarbon charging records, halocarbon leak tests and release reports, transportation and effects as well as records of pesticide use and environmental spills	Originating	E+5 E=the material no longer in use	No	Mostly accessible, may contain security related information	Excludes Staff Safety Training - see H12 Personal exposure – see H17
P05	Incident/Accident Reports Includes vandalism and security incident reports and reports of accidents that occur at recreational facilities and other municipal properties.	Finance	E+5 E=close of action	No	No	Excludes: Security - see A18 Accidents of Municipal Staff - see H04 Vehicle Accidents - see

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
						L02 or L03 Emergency Incident Reports – see P17
P06	Building and Structural Inspections Includes inspection reports such as building, plumbing, fire prevention and other structural inspections. Also includes inspections of marijuana grow operations after appropriate notification from a police force.	Planning and Development	E E= End life of the Building	Yes	Access to own personal or business files	Excludes: By-law Enforcement – see P01
P07	Fire Safety Inspections Includes Fire Marshal related health and safety violation and verification inspection reports conducted or performed on private, public and commercial properties.	Fire	E E=outdated	Yes	Access to own personal or business files	
P08	Fire Marshal Investigations Includes records of fire marshal investigations on emergencies such as traffic accidents or fire fighting activities.	Fire	10	Yes	Access to own personal or business files	Excludes: By-law Enforcement – see P01 Harassment & Violence staff investigations – see H15
P09	Licences Includes records regarding licenses administered by or required by the municipality, or required by the province, such as licensing for dog kennels, dogs, liquor, businesses, lotteries, special occasion letters, etc.	Legislative and Legal Services	E+3 E=Expiry of License	Yes	Access to own personal or business files	Excludes: Marriage Licences - see L12-01
P10	Building Permits Includes information regarding permits, permits issued to builders, contractors, and residents giving them permission to build or renovate. Includes certificates of occupancy, pool permits, or septic permits, Includes information regarding permits, permits issued to builders, contractors, and residents giving them permission to build or renovate. Includes certificates of occupancy, pool permits, septic/sewage permits or backflow prevention permits.	Planning and Development	P	Yes	Yes	Excludes: All other permits - see P11
P11	Permits, Other Includes applications and copies of permits issued by other government bodies within the	Originating	E+3 E=Expiry of permit	Yes	Access to own personal or business files	Excludes: Building Permits - see P10

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Town as well as permits issued giving permission to hold special events, burn permits, facility rentals, signs, parking on the street, etc.					Encroachment Permits - see D16 Burial Permits - see L12-02 Road and lane opening/closings – see T09
P11-01	Development Permit Application - Niagara Escarpment Commission Records about reviewing NEC applications, includes NEC applications, permits, planner comments and revisions	Planning and Development	E+7 E=Date of final decision	Yes	Access to own personal or business files	
P12	Warrants Includes all issued warrants.	Legislative and Legal Services	E+2 E=Execution of warrant	Yes	Access to own personal or business files	
P13	Criminal Records Includes all documentation relating to individuals with a history of criminal activity.	Legislative and Legal Services	E+5 E=Occurrence/ investigation closed or disposition of charge	Yes	Access to own personal or business files	Excludes: Investigations Prosecutions – see L13
P14	Animal Control Includes records regarding the control of household pets, strays, livestock and wildlife and livestock evaluation reports. Also includes records of distrained animals and pound animal records.	Legislative and Legal Services	E+3 E= after animal is impounded	Yes	Access to own personal or business files	Excludes: Dog Licenses - see P09
P15	Community Protection Programs Includes records on community protection and crime prevention such as Fire Training Programs, Milton Safety Committee and Block Parents. Records include correspondence and brochures.	Fire	E+2 E=information updated	No	Yes	
P16	Emergency Services Includes records regarding fire and rescue services.	Fire	E+5 E=outdated or not in use	Yes	Access to own personal or business files	
P18	Fire Accident Response Reports	Fire	P	Yes	Access to own	Excludes:

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes records relating to fire services provided such as fire suppression and emergency call response. Includes fire call reports and fire cause identification.				personal or business files	Investigations – see P08
P19	Fire Statistics Includes records relating to performance plans and the associated statistical reporting of performance and calls.	Fire	E + 2 E=updated or replaced	No	Yes	
P21	Facilities Routine Water Use, Monitoring and Testing Includes records regarding the testing of swimming pool or splash pad water for chlorine and pH levels, water outlet inspections, the number of bathers per day, any rescues or breakdowns of equipment. Also includes routine testing, monitoring and flushing of water systems in Town's recreation facilities.	Community Services	1	No	Consult Legislative Services	

P – Permanent E - Event

R RECREATION & CULTURE

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
R00	Recreation and Culture – General Includes records regarding recreation and cultural services which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
R01	Heritage Preservation Includes records regarding heritage and historical development, including designations and registers of buildings, districts, and cemeteries as well as archaeological digs, archaeological and heritage assessments, and heritage conservation district studies and plans. May also include heritage registries.	Legislative and Legal Services Planning and Development	P	No	Consult Legislative Services	Excludes: Original By-Laws - see C01
R04	Parks and Trails Management Includes correspondence, descriptions, reports and other records dealing with the management design, set-up, and landscaping of specific municipal parks. Includes maps and plans	Community Services	E E=End life of Parks/Trails	No	Yes, excluding any personal or park security information	Excludes: Parks and Trails Maintenance – see A20
R05	Recreational Facilities Includes correspondence, descriptions, reports and other records dealing with the management, operation and design of specific municipal recreational facilities, such as arenas, rinks, halls, schools, pools, and fitness centres. Includes floor plans, architectural and engineering drawings. More specific information is filed by subject.	Community Services	E E=End life of the facilities	No	Inspection reports only	Excludes: Facilities Construction - see A19 Facility Maintenance - see A20
R06	Recreational Programming Includes correspondence, applications, registrations and general information regarding the development and delivery of recreational programs to the community such as youth, sport and fitness, adult education, crafts, membership forms, and other programs.	Community Services	3	Yes	Access to own personal or business files	
R06-01	Registration records Includes withdrawal forms/refund forms/CLASS adjustments/waiver forms.	Community Services	1	Yes	Access to own personal or business files	
R06-02	Attendance fee collection	Community Services	7	Yes	Access to own personal or business files	

P – Permanent E - Event

S SOCIAL & HEALTH CARE SERVICES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
S00	Social and Health Care Services – General Includes records regarding social and health care services provided to individual residents which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
S04	Community and Social Assistance Services Includes general program information regarding financial assistance program and support available to residents within the municipality.	Community Services	E+3 E=end of services	Yes	Access to own personal information	
S11	Disabilities Support Clients Includes records dealing with applications for and provision of services and funding support to persons with mental or physical disabilities including service and support profiles, and accessible transportation eligibility application and approval, behaviour support plans, intrusive behaviour intervention and crisis situation incident reporting. Also includes personal support plans and records for individuals as well as summary reports relating to support services provided for people with disabilities.	Originating	E+7 E= no longer receiving support	Yes	Access to own personal information	Excludes: serious occurrences and abuse allegations involving municipal staff – see H15

P – Permanent E - Event

T TRANSPORTATION SERVICES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
T00	Transportation – General Includes records regarding transportation which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
T01	Illumination Includes records and studies regarding the installation and repair of equipment used to illuminate roads such as street lights, pedestrian crossover lights, etc. Also includes records on power consumption.	Engineering Services	E+6 E=completion of project/request with no issues	No	Yes, excluding any security related information	Excludes: Lights Specifications – see A27
T02	Parking Includes records and studies regarding municipal parking issues such as handicapped parking, lot and garage operations, fire routes and employee parking	Engineering Services	E+6 E=lot closed	No	Yes	Excludes: Parking Enforcement – See P01
T03	Public Transit Operations Includes records regarding public transit systems. Includes schedules, routes, maps and similar information. Also includes project records regarding the construction of bus shelters and similar facilities, route administration and planning, fare policies, and intergovernmental transit co-ordination.	Engineering Services	E + 1 E = Outdated	No	Yes	Excludes: Accidents – See L02
T04	Road Construction Includes records and studies regarding construction projects on roads. Includes the construction of new roads and major improvements to existing roads, such as resurfacing, widening, bridges, etc.	Engineering Services	E+5 E= completion of project/request with no issues Specifications are Permanent	No	Consult Legislative Services	Excludes: Design and Planning - see T05 Routine maintenance and minor improvements to road systems – see T06
T05	Road Design and Planning Includes estimates, studies and other records regarding the design and planning of specific road construction projects. Also includes design of curbs and sidewalks, cycle ways, footpaths, walkways, etc.	Engineering Services	E+5 E=outdated Specifications are Permanent	No	Consult Legislative Services	Excludes: Road Specifications – see A27
T06	Road Maintenance Includes records and studies regarding the inspection and maintenance of roads. Minor repair maintenance Includes the installation of culverts, minor repairs to the road surfaces, curbs and side-walks, cycle-ways, footpaths, walkways, etc. Routine maintenance includes grading, ploughing and sanding of roads, and snow	Engineering Services	E+5 E=completion of project/request with no issues	No	Consult Legislative Services	Excludes: Road Specifications – see A27

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	removal and cleaning, winter maintenance.		Specifications are Permanent			Claims – see L02
T06-01	Salt Usage Includes Salt Management Plan and revisions, yearly review, reports, other records, studies, and information regarding salt usage and contamination from salt used on roads.	Engineering Services	7	No	Consult Legislative Services	
T07	Signs and Signals Includes records and studies regarding the manufacture, installation and servicing and maintenance of signs and signals.	Engineering Services	E+5 E=completion of project/request with no issues	No	Yes	Excludes: Visual Identity Program - see M09 Claims – see L02 Sign Permits – see P11
T08	Traffic Includes records about traffic related capital projects. Includes studies and information regarding the flow of traffic on roads. Includes intersection drawings, pedestrian crossovers, crossing guards, traffic counts, accident statistics and related records. Also includes temporary road closures for special events.	Engineering Services	E+5 E=completion of project/request with no issues	No	Consult Legislative Services	Excludes: Specifications – see A27
T09	Roads and Lanes Closures Includes records on roads and lanes closed on a permanent or regular basis. Records include reports, appraisals, correspondence and district court applications. As well as records related to requests to open road and street allowances.	Engineering Services	E+5 E=completion of project/request with no issues	No	Yes, may be limited to own personal or business information	Excludes: Temporary road closures - see T08 Land Sales - see L07 Road Closing By-Laws - see C01 Excludes: Specifications – see A27
T10	Field Survey/Road Survey Books Includes engineering field survey notes as well as books.	Engineering Services	E+5 E=completion of project/request with no issues	No	Consult Legislative Services	
T11	Bridges Includes estimates, studies and other records regarding projects specifically for bridge construction, also includes bridge repairs and maintenance.	Engineering Services	E+5 E=completion of project/request	No	Yes, excluding any security related information	Excludes: Specifications – see A27

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
			with no issues			

P – Permanent E - Event

V VEHICLES & EQUIPMENT

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
V00	Vehicles and Equipment – General Includes records regarding vehicles and equipment which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1	No	Yes, excluding any security related information	
V01	Fleet Management Includes records of summary fleet information and fleet records for each vehicle (including attached devices such as Fire-Fighting Chassis Mounted Aerial Devices) leased or owned, operated and maintained by the municipality. This includes plate permits, CVOR certificates, operating manuals, routine/daily inspections, vehicle history files, and vehicle maintenance, registration and disposal.	Engineering Services Fire	E+1 E=Dispose of equipment	No	Yes, excluding any security related information	Excludes: Insurance Policies - see L06 Accident Claims - see L02, L03 Leases/Contracts - see L14
V01-01	Vehicle Daily Inspection	Engineering Services	2	No	Yes, excluding any security related information	
V01-02	Public vehicles trip records	Engineering Services	1	No	Yes, excluding any security related information	
V02	Mobile Equipment Includes records and operating manuals regarding mobile (motorized) equipment used in conjunction with vehicles. Also includes routine inspections, maintenance and history files on equipment such as generators, pumps, snow-blowers, sanders, etc.	Originating	E+1 E=Dispose of equipment	No	Yes, excluding any security related information	
V03	Transportable Equipment Includes operating manuals and records regarding transportable equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as lawnmowers, hoses, weed-eaters, drills, and rescue equipment.	Originating	E+1 E=Dispose of equipment	No	Yes	
V04	Protective Equipment Includes records regarding protective equipment used by the municipality. Also includes maintenance and history files on equipment such as breathing apparatus, breathing tanks, down alarms, etc.	Originating	E+1 E=Dispose of equipment	No	Yes	Excludes: Uniforms and Clothing - see A14
V05	Ancillary Equipment Includes records regarding fixed equipment, which is non-vehicle and non-office in nature. Includes equipment such as work or suspended platforms, lifting devices not attached to a structure, appliances such as autoclaves and dishwashers, garbage compactors, industrial shredders etc. Includes correspondence, equipment user and procedural manuals, warranty,	Originating	E+1 E=Dispose of equipment	No	Yes, excluding any security related information	Excludes: Gasoline storage tanks – see E24 Mechanical & operational

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	routine inspections, maintenance, licences and history records. Includes setup tests and manuals.					systems integral to building structure – see A26

P – Permanent E - Event



The Corporation of the Town of Milton

Report To: Council

From: Jill Hogan, Commissioner, Development Services
Glen Cowan, Chief Financial Officer / Treasurer

Date: December 18, 2023

Report No: DS-057-23

Subject: Trafalgar and Agerton Master Environmental Servicing Plan - Budget Increase, Funding Agreement and Contract Increase

Recommendation: THAT Council approve a budget increase of \$338,127 (inclusive of HST) for the Trafalgar and Agerton Master Environmental Servicing Plan (MESP) funded by the Milton P4 Trafalgar Landowners Group;
AND THAT the Mayor and Town Clerk be authorized to execute a funding agreement between the Town and the Milton P4 Trafalgar Landowners Group for the Trafalgar and Agerton MESP budget increase;
AND THAT the Commissioner of Development Services be given delegated authority to negotiate a draft funding agreement prior to execution; subject to the satisfaction of the Chief Financial Officer/Treasurer and the Town's legal counsel;
AND THAT upon execution of the funding agreement, Council authorize a contract increase of \$261,981.90 (exclusive of HST) to WSP for the completion of the Trafalgar and Agerton MESP;
AND THAT the Manager, Purchasing and Supply Chain Management be authorized to execute the contract changes, as outlined by the purchasing by-law.

EXECUTIVE SUMMARY

- This report is seeking Council approval for a budget increase to complete the Trafalgar and Agerton Master Environmental Servicing Plan (the MESP).
- The Town and landowners have identified the opportunity to have the budget increase funded by the Milton P4 Trafalgar Landowners Group (Trafalgar LOG) in order to ensure timely completion of the works given the legislative changes related to development charges and the current deficit position of the Town's Growth Studies Development Charge reserve fund.

EXECUTIVE SUMMARY

- This report is also seeking Council approval for an increase to the existing consulting services contract with WSP for the completion of the MESP. It is recommended that the contract increase only be executed upon execution of the funding agreement with the Trafalgar LOG.

REPORT

Background

A Master Environmental Servicing Plan is the second stage of the environmental planning process that takes into consideration the natural heritage system (NHS) and environmental principles and criteria while developing more detailed servicing plans (storm, water, wastewater, roads) to support Secondary Plan programs. The Trafalgar and Agerton MESP was initiated in 2018 to support the Trafalgar Secondary Plan and the Agerton Secondary Plan.

As outlined in report PD-049-18, the Trafalgar and Agerton MESP (the MESP) uses a different approach, compared with previous secondary plan areas. The MESP is undertaking a more detailed assessment at the secondary plan stage by including analysis that previously would have been undertaken at the tertiary plan stage.

Council, through report PD-049-18, awarded the contract for the completion of the MESP to Wood Environment and Infrastructure Solutions (Wood) in September 2018. Wood was subsequently acquired in 2022 by the firm WSP. As such, the contract for the completion of the MESP now lies with WSP.

Through PD-049-18, the contract was awarded in the amount of \$1,136,078 (exclusive of HST). Subsequently, the contract was increased by \$13,342 in April 2019. The current contract total is \$1,149,420 (exclusive of HST). The MESP award and past increase were funded from the Growth Studies Development Charge Reserve Fund.

After the initiation of the project in 2018, the following key milestones have been completed by the consulting team:

- Field Program
- Existing Conditions Report
- Impact Assessment for “do nothing” scenario

Discussion

The approach taken for the Trafalgar and Agerton MESP to advance the more detailed assessment at an earlier planning stage has benefited from a higher level of collaboration with the landowners groups. From 2020 to 2023, the following tasks were undertaken beyond the original work plan:

Discussion

- Receipt and review of supplemental Landowner Information (2020-2021)
- Update of Existing Conditions Report (January 2022)
- TAC meeting to present updated Existing Conditions (January 2022)
- Receipt and review of supplemental Landowner information (2022)
- Meetings with Town and Landowner representatives (throughout 2022 and 2023)
- Update of Existing Conditions Report and submission to Town (May 2023)

In October 2023, the consulting team reviewed and updated the work plan required to complete the MESP. Due to the tasks listed above that were beyond the original work plan and taking into account the remainder of the tasks required to complete the MESP, the consulting team has estimated that \$261,981.90 (exclusive of HST) of additional fees are required.

A budget increase for the Trafalgar and Agerton MESP project (C90015118) is required to fund the additional Other Professional Fees (consultant fees), Contingency and Project Management Recovery (Town Staff time costs). A 10% contingency on top of the after-tax Other Professional Fees increase is recommended. Based on the remaining work plan, an increase to the Project Management Recovery budget for additional Town Staff time costs is also required. A combined budget increase of \$338,127 (inclusive of HST) is being requested.

Due to recent changes to the *Development Charges Act* through Bill 23: *More Homes Built Faster Act, 2022*, it is unlikely that these additional costs could be recovered through future development charge by-laws and collections. As such, and in order to avoid any delay in the study process given the current deficit position of the Town's Growth Studies Development Charge Reserve Fund, staff and the landowners identified the opportunity to have the incremental costs for the study be directly funded by the Milton P4 Trafalgar Landowners Group (Trafalgar LOG) through a funding agreement.

Staff have prepared a draft funding agreement, and at the time of drafting this staff report are in the process of reviewing it with external legal counsel. The proposed terms and conditions of the agreement are aligned with other similar funding agreements and include the following:

- Definition and scope of the additional works to be funded by the Trafalgar LOG
- Requirement of the Trafalgar LOG to fund 100% of the cost increase of \$338,127, with no obligation for a future repayment of all or part of the costs from the Town
- Commitment from the Town to investigate alternative funding sources and if permitted by legislation and at the sole and absolute discretion of the Town, to include the costs in a future Town Charge By-law for future repayment to the Trafalgar LOG

Although the Trafalgar Secondary Plan and the Agerton Secondary Plan were initiated concurrently, the Trafalgar Secondary Plan proceeded at a faster pace than the Agerton Secondary Plan. Although still under appeal, the Trafalgar Secondary Plan has been adopted by Town Council and more detailed land use inputs are available. The Agerton Secondary Plan has yet to be adopted by Council.



Discussion

The work plan included in the \$261,981.90 (exclusive of HST) additional consultant fee estimate includes a detailed impact assessment for the Trafalgar Secondary Plan Area based on more detailed land use inputs; while a high-level assessment for the Agerton Secondary Plan Area will be done based on the June 2022 draft of the Agerton Secondary Plan.

Should there be significant differences between the June 2022 draft Agerton land use plan and the final adopted and approved Agerton land use plan, as well as between the corresponding drainage plans, a further level of assessment will be required in the future to validate and refine the recommendations of the MESP. It is anticipated that any further study work for the Agerton Secondary Plan Area (Agerton Annex) will need to be funded by the Agerton Landowners Group.

The Trafalgar and Agerton MESP is scheduled to be completed and finalized by end of Q2 2024. The need, scope and timing of further more detailed study for Agerton will be reviewed once the Agerton Secondary Plan is finalized. The current work plan has been reviewed with and agreed to by the Trafalgar and Agerton Landowners Groups to allow planning processes for the Trafalgar Secondary Plan Area to move forward.

With Council’s approval and upon execution of a funding agreement with the Milton P4 Trafalgar Landowners Group, a \$261,981.90 (exclusive of HST) contract increase will be awarded to WSP for the completion of the MESP. The new contract total with WSP will be \$1,411,401.90 (exclusive of HST).

Financial Impact

As noted above, staff are recommending a budget increase in capital project C90015118 for the Trafalgar and Agerton MESP summarized as follows:

Description	Amount
Other Professional Fees	266,593
Contingency	26,659
Project Management Fees	44,875
Total Budget Increase	\$338,127

The existing approved budget for the MESP was funded from the Growth Studies Development Charge Reserve Fund, which is currently in a deficit position. Recent changes to the Development Charges Act through Bill 23: *More Homes Built Faster Act, 2022*, have removed growth studies as a development charge eligible expense and as such, it is unlikely



Discussion

the Town will be able to include these additional costs in a future development charge by-law.

In an effort to prevent further deficits in the Growth Studies DC reserve fund and to ensure that the study process can continue without delay, staff and the landowners have identified the opportunity to have the budget increase be funded by the Milton P4 Trafalgar Landowners Group through a funding agreement. As a result of the proposed funding agreement, there is no anticipated long-term financial impact to the Town of the additional works.

Respectfully submitted,

Jill Hogan
Commissioner, Development Services

Glen Cowan
Chief Financial Officer / Treasurer

For questions, please contact:	Wendy Chen	Phone: Ext. 2296
	Melanie Wallhouse	2314
	Jennifer Ahern	2361

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.



The Corporation of the Town of Milton

Report To: Council

From: Jill Hogan, Commissioner, Development Services

Date: December 18, 2023

Report No: DS-063-23

Subject: Recommendation Report - Notice of Intention to Designate - 94 Victoria Street - Jane McCann House

Recommendation: THAT Staff Report DS-063-23 entitled: "Notice of Intention to Designate - 94 Victoria Street - Jane McCann House be received;

THAT Milton Council recognizes the historic house at 94 Victoria Street in the Town of Milton as being of heritage significance;

THAT Milton Council designate the property under Part IV of the Ontario Heritage Act, R.S.O. 1990, c. O.18 for the reasons outlined in the Reasons for Designation attached as Appendix 1 to this Report;

AND THAT the Town Clerk provides the Notice of Intention to Designate as outlined in Section 29 (4) of the Ontario Heritage Act;

AND FURTHER THAT once the thirty-day objection period has expired and if there are no objections, a designation by-law is brought forward for Council adoption.

EXECUTIVE SUMMARY

- The original property at 94 Victoria Street is a one-storey, cut brick Regency cottage built around 1856. This home has distinctive brick pilasters at the windows and corners.
- The property's current owner has voluntarily responded to the heritage designation program and desires that their property be designated.
- This historic home is a significant built heritage resource for the Town of Milton and should be designated under Part IV of the Ontario Heritage Act. (See Appendix '1')
- This significant heritage resource fulfils more than two of the evaluation criteria set out in Part IV of the Ontario Heritage Act (R.S.O. 1990), Ontario Regulation 9/06 (See Appendix 2). As such, it is worthy of designation under the provisions of the Ontario Heritage Act.

REPORT

Background

The Jane McCann house, at 94 Victoria Street in the Town of Milton, is a one-storey, cut brick Regency cottage built around 1856. This home has distinctive brick pilasters at the windows and corners. The hipped roof has deep eaves' trim and tall windows, characteristic of this style. Originally, the building was almost square in plan with a small L-shape addition at the rear. This house was enlarged without overwhelming the original history in 1995. The property received a Heritage award in 1996 for conservation work done to a non-designated property.

Discussion

The cultural heritage value and interest of this house lies in its physical, historical and contextual value. It is an excellent example of an Ontario Regency-style cottage.

Historically, this property was granted in 1856 to Jane McCann, widow of Alexander McCann. The McCann family were Irish immigrants who owned 550 acres east of Guelph Line. The McCanns built a gristmill and a sawmill on 16 Mile Creek and operated a woollen mill in Campbellville. In 1870, the property was purchased by Hepzibah Bastedo, widow of Jacob Bastedo.

Physically, this house is a beautiful example of a Regency-style cottage. Its asymmetry is a noticeable departure from the symmetrical buildings that would have dominated Milton in the mid-nineteenth century. The original house had a three-bay square plan with a rubble stone wall foundation. A rear addition was constructed in 1995. The exterior wall is made of hand-made bricks in a Flemish bond on the front, with a common bond used on its less prominent sides. This house includes large windows and a hipped roof. The single leaf entrance door has a rectangular transom light overhead, but does not include side lights. This home has distinctive brick pilasters at the windows and corners.

Contextually, this house is one of the earliest houses built in John Martin Survey (Lot G, Plan No.17) in 1855. This house was one of the first in the early subdivisions of Milton that were created even before Milton was incorporated as a Town in 1857. The Martin Survey included houses North of Mill Street, East of Bronte Street North, west of Martin Street and south of Mill Pond. This house helps to define, maintain and support the heritage character of this neighbourhood.

Discussion

Key attributes that reflect the cultural heritage value of the property include:

- The original one-story, three-bay historic house with a low-hip roof, square plan and rubble stone wall foundation.
- Central porch entrance with deep eave trim, decorative frieze and plain soffit, double plain wood posts with decorative motifs
- Single leaf entrance door with rectangular transom light and brick pilasters surrounds
- Pug (hand-pressed) bricks laid in a Flemish bond on the front façade with a common bond on its less prominent sides and unique brick pilasters between windows.
- Large double sash, six over six windows.
- Contextual value as one of the earliest houses built in the John Martin Survey (Lot G, Plan No.17) in 1855.

Staff Recommendation

Staff recommends that the optimal conservation and protection measures for this heritage property is the designation of the property.

Financial Impact

There is no financial impact associated with this report.

Respectfully submitted,

Jill Hogan
Commissioner, Development Services

For questions, please contact: Anthony Wong, Senior Policy Planner Phone: Ext. 2565



Attachments

- Appendix '1'_Reasons for Designation for 94 Victoria Street_ Jane McCann House
- Appendix '2'_CHVI Evaluation_ 94 Victoria Street
- Appendix '3'_Photographic Record Heritage Attributes_ 94 Victoria Street

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

Reasons for Designation

94 Victoria Street_ Jane McCann House



Legal Description

John Martin Survey Lot G, Block 3, Plan 17

Description of Property

The Jane McCann house, at 94 Victoria Street in the Town of Milton, is a one-storey, cut brick Regency cottage built around 1856. This home has distinctive brick pilasters at the windows and corners. The hipped roof has deep eave trim and tall windows, characteristic of this style. Initially, the nearly square plan has a small ell at the rear. This house was enlarged without overwhelming the original historic character in 1995. The property received a Heritage award in 1996 for conservation work done to a non-designated property.

Statement of Cultural Value and Interest

94 Victoria Street is a brick Regency cottage with a hip roof and brick pilasters at the windows. Granted in 1856 to Jane McCann, widow of Alexander McCann, she resided in this historical house until 1870. Its cultural heritage value lies in its physical, historical and contextual value. Physically, it is an excellent example of an Ontario Regency-style cottage with a hip roof and unique brick pilasters at the windows. Historically, it is the house of Jane McCann, widow of Alexander McCann, who was a pioneer in Milton. Contextually, this property is one of the original houses in the John Martin Survey Plan 6 for this significant part of Old Milton.

Design Value or Physical Value

This house is a beautiful example of a Regency-style cottage. Its asymmetry is a noticeable departure from the symmetrical buildings that would have dominated Milton in the mid-nineteenth century. The original one-story, three-bay house with a low-hip roof has a square plan and rubble stone wall foundation. The hipped roof has deep eave trim and large tall double sashed, six over six windows with stone lug sills, which is characteristic of this era. The single entrance door includes a rectangular transom light overhead but without side lights. This home has distinctive brick pilasters at the windows and corners. The hand-made bricks are laid in a Flemish bond on the front, with a common bond being used on its less prominent sides. This house was enlarged without overwhelming the original history in 1995. This property received a heritage award in 1996.

Historical Value

This house was built for Jane McCann, whose husband, Alexander McCann, died in 1854. They were Irish immigrants who significantly contributed to their new country, Canada. At Alexander's death, 20 years after coming here, the family owned 550 acres east of Guelph Line. Alexander built a gristmill and a sawmill on 16 Mile Creek and operated a woollen mill in Campbellville.

Susan McCann, the daughter, became a school teacher and married James Harrison of Lot 11, Concession 1 Trafalgar (northwest corner of Derry Rd. and Bronte St.) The Harrison family was one of the earliest to settle in Milton.

In 1879, Jane McCann sold the cottage to Hepzibah (Chilver) Bastedo, widow of Jacob Bastedo, who owned a hat shop on Main Street. One of their five children, Elizabeth, studied painting in Paris, France, later becoming a professional artist and well-known teacher in Milton. Elizabeth Bastedo was active in St. Paul's Church and its Sunday school for 65 years.

Contextual Value

This property has contextual value as one of the earliest houses built in John Martin Survey (Lot G, Plan No.17) in 1855. This was one of the very early subdivisions in Milton that was created even before Milton was incorporated as a Town in 1857. The Martin Survey included houses North of Mill Street, East of Bronte Street North, west of Martin Street and south of Mill Pond. This house helps define, maintain, and support the heritage character of this neighbourhood, and it is seeing an increase in the number of designated heritage properties.

Character Defining Elements/Heritage Attributes

Key attributes that reflect the cultural heritage value of the property include:

- The original one story three bay historic house with low-hip roof, square plan and rubble stonewall foundation.
- Central porch entrance with deep eave trim, decorative frieze and plain soffit, double plain wood posts with decorative motifs
- Single leaf entrance door with glazed transom and brick pilasters surrounds
- Pug (hand pressed) bricks laid in a Flemish bond on the front façade with common bond being used on its less prominent sides and unique brick pilasters between windows.
- Large double-sash, six over six windows with stone lug sills.
- Contextual value as one of the earliest houses built in the John Martin Survey (Lot G, Plan No.17) in 1855.

Cultural Heritage Value or Interest Evaluation

Ontario Regulation 9/06 of the *Ontario Heritage Act* establishes the criteria for determining Cultural Heritage Value of Heritage Resources. A property must have the potential to meet at least two of the criteria to be considered to have heritage significance. These criteria fall into three categories: design or physical value, historical or associative value and contextual value. The following table considers and evaluates the subject property against these criteria.

Table 6: Evaluation of the Cultural Heritage Value of 94 Victoria Street

The property has design value or physical value because it,		
	Criteria	Evaluation
i	is a rare, unique, representative or early example of a style, type, expression, material or construction method	Yes, this house is a beautiful example of a Regency-style cottage. Its asymmetry is a noticeable departure from the symmetrical buildings that would have dominated Milton in the mid-nineteenth century.
ii	displays a high degree of craftsmanship or artistic merit	This home has unique and distinctive brick pilasters at the windows and corners.
iii	demonstrates a high degree of technical or scientific achievement	No, the property does not demonstrate a high degree of technical or scientific achievement
The property has historical value or associative value because it,		
i	has direct associations with a theme, event, belief, person, activity, organization or institution that is significant to a community,	Historically, it is the house of Jane McCann, widow of Alexander McCann, who was a pioneer and whose family owned 550 acres of land east of Guelph Line at Campbellville.
ii	Yields or has the potential to yield, information that contributes to an understanding of a community or culture	Yes, it provides historical information on the pioneers of Milton.
iii	demonstrates or reflects the work or ideas of an architect, artist, builder, designer or theorist who is significant to a community	No, the subject property does not demonstrate or reflect that the subject property is associated with any known architect, builder or designer.
The property has contextual value because it,		
i	is important in defining, maintaining or supporting the character of an area	Yes, this property has contextual value as one of the earliest houses built in

		John Martin Park Survey (Plan No.17) in 1855
ii	is physically, functionally, visually or historically linked to its surroundings	Yes, this property has contextual value as one of the earliest houses built in John Martin Park (Plan No.17) in 1855
iii	is a landmark	No, the property is not a landmark.

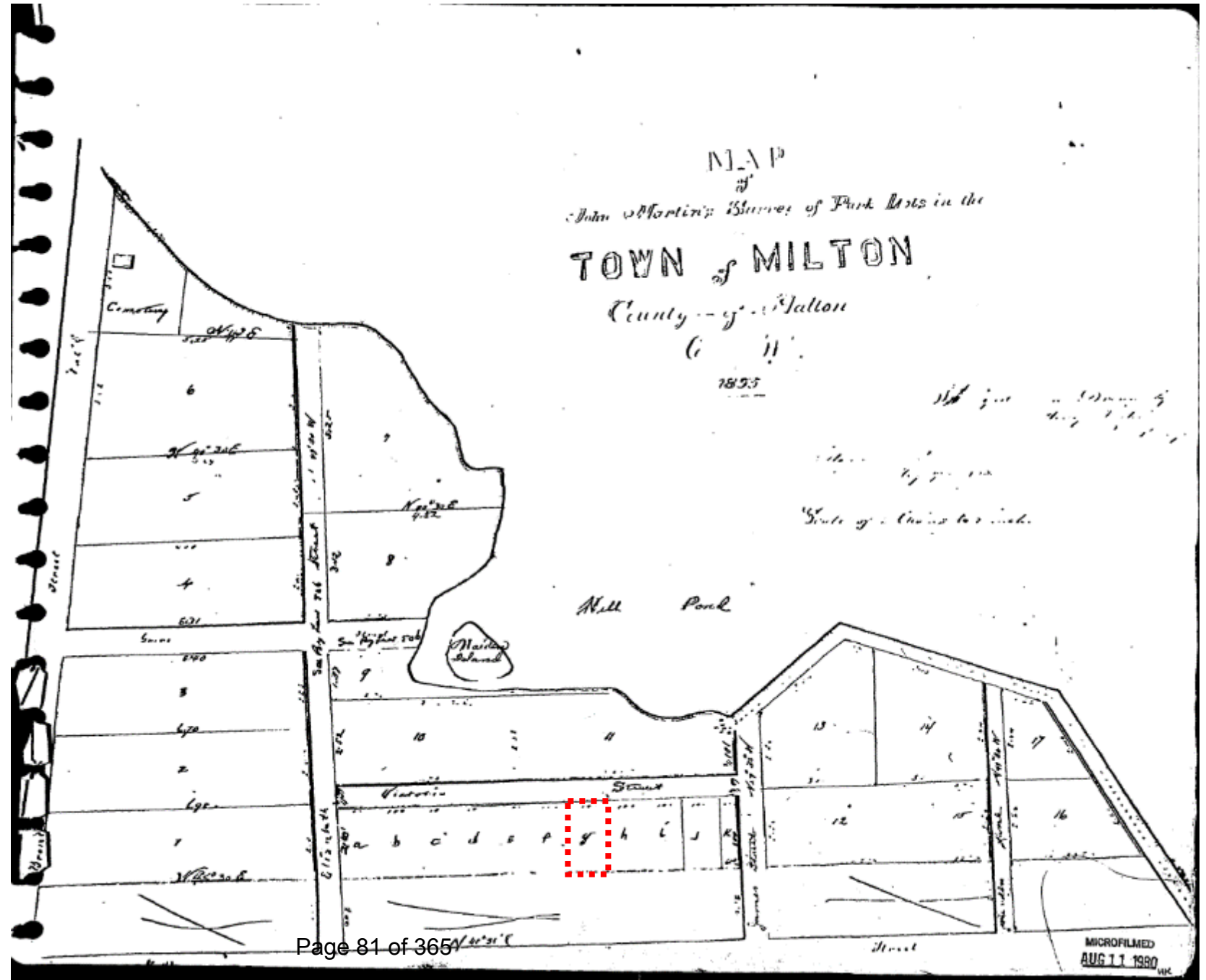
Based on the above criteria, the subject property has significant cultural heritage value based on both design and contextual criteria. These attributes are sufficient to warrant Heritage Designation under the *Ontario Heritage Act*. However, designation may not be necessary at this time as the property is current listed on the Municipal Heritage Register, which offers it some protection from demolition.



Appendix 3
Photographic Record _ Heritage Attributes _ 94 Victoria Street

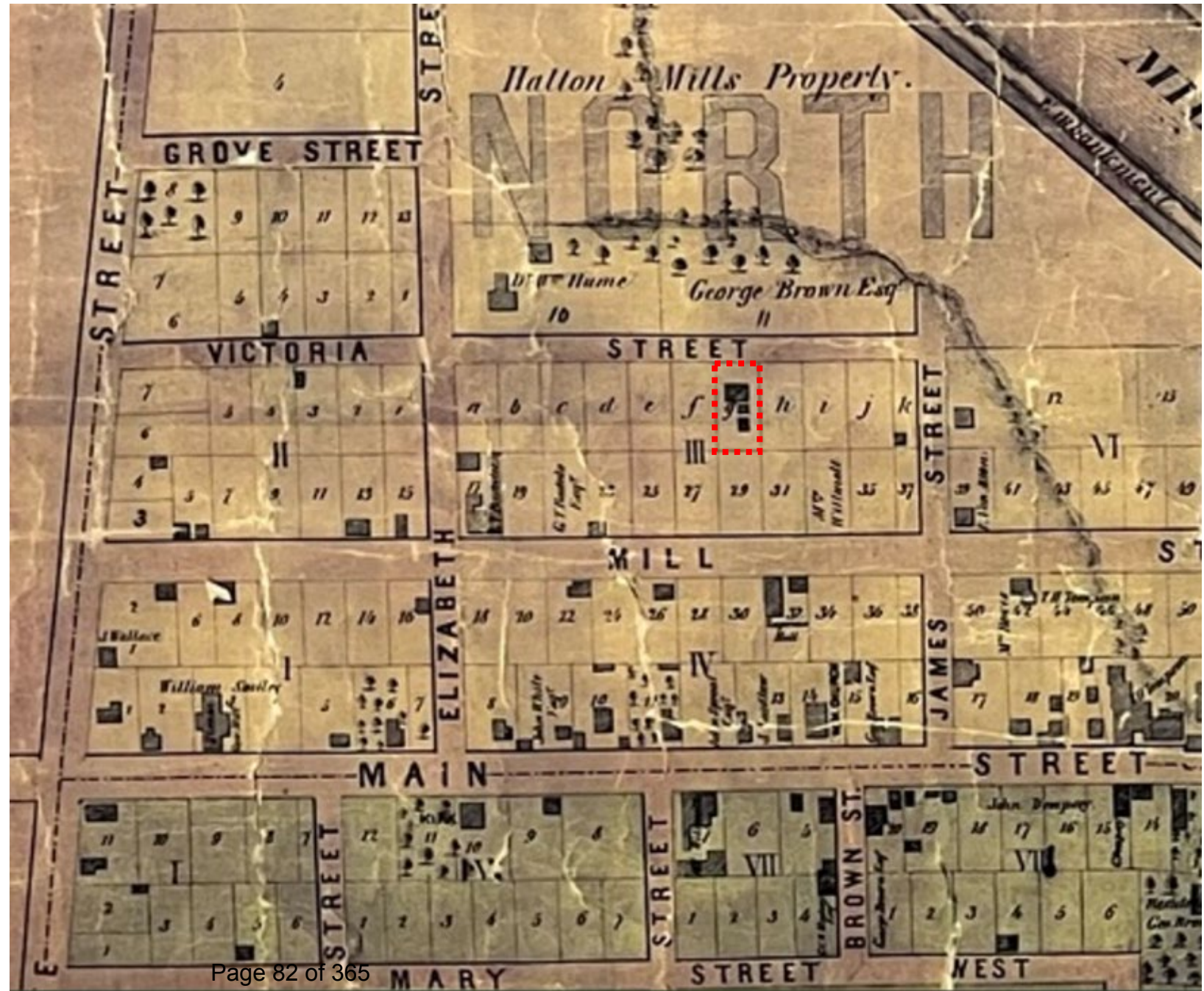
Contextual Heritage Attributes

- Contextually, it is one of the earliest houses built in the John Martin Survey (Lot G, Plan No.17) in 1855. This was one of the very early subdivisions in Milton that were created even before Milton was incorporated as a Town in 1857.



Contextual Heritage Attributes

- Location of House shown in the Map of the Town of Milton, County of Halton, Canada West, T.C. Livingston P.L.S. 1858



Heritage Award 1996

Winner of the "Conservation Work done to a Non-Designated Property" category.



January 26, 1996

Mr. and Mrs. D. Corker
94 Victoria Street
Milton, Ontario
L9T 1S7

Dear Mr. and Mrs. Corker:

On behalf of Heritage Milton (LACAC), I wish to congratulate you for being chosen as a Heritage Award Winner in the category of "Conservation Work Done to a Non-Designated Property". You are invited to attend the Milton Heritage Awards ceremony on Sunday, February 18th, 1996 at High Foster Hall. The Heritage Awards Day will include a walking tour of Victoria Square at 1:30 p.m. followed by the awards ceremony at 2:15 p.m.

As part of this year's ceremony, we are asking all award winners to set up a tabletop display and to give a five minute talk about their winning project. Your speech could include:

- why the project was undertaken
- obstacles you may have had to overcome
- interesting findings, light hearted moments
- what you learned, acknowledgements, etc.

Please contact me at 854-9989 or 878-2133 (daytime) to confirm your participation for the Awards Day and to discuss preparations. We would also like to strongly encourage architectural award winners to bring before and after photos for display.

The high quality of the historical projects completed by this year's award winners in all categories promises to make this ceremony a very special event. Thank you for your contribution to teaching this generation and future generations about the accomplishments and sacrifices of our ancestors.

Sincerely,

Dorrie Murdoch-Greig, for
Heritage Milton (LACAC)
Coordinator Architectural Awards
1995 Milton Heritage Awards

Historical Books

HALTON COUNTY (20), TRAFALGAR, Plan 17

4 August 1856

George Brown Wife to Jane McCann

18 June 1879

Jane McCann to Hepzibah Bastedo

Lot G

\$1,550

LOT G

SOUTH EAST
OF VICTORIA
ST.

PLAN 17

PAGE ..1.....

INSTRUMENT	DATED	REGISTERED	FROM	TO	ACRES	DESCRIPTION, etc.
483 G B-7 Sale	4 Aug 1856	31 Aug 1856	George Brown wife	Jane M ^{rs} Cann	1/5	Lot G
484 Mortgage	14 Aug 1856	31 Aug 1856	Jane M ^{rs} Cann	William Willmott Thomas Brown & George Brown, Associates of Alexander McCann	1/5	
255 Certificate of Dist	26 March 1860	29 March 1860	William Willmott and Thomas Brown, Associates of Alexander McCann	Jane M ^{rs} Cann	1/5	
1398 B-7 Sale	18 June 1879	July 1879	Jane M ^{rs} Cann (Relict of Alexander M ^{rs} Cann)	Hepzibah Bastedo (Relict of Jacob Bastedo)	1/5	Lot G, waterland \$1500.
1489 Mortgage	12 June 1879	July 1879	Hepzibah Bastedo, widow	Jane M ^{rs} Cann, widow	1/5	Lot G. \$1000.

Existing Location_ 94 Victoria_ Jane McCann House



Historical Heritage Attributes

- Home of Jane McCann, 1856

94 VICTORIA STREET

Lot G
John Martin Park, Plan 17
Built about 1856



A brick Regency Cottage, this home has distinctive brick pilasters at the windows and corners. The hipped roof has deep eave trim; tall windows are characteristic of the style. Originally nearly square in plan with a small ell at the rear, this house has been substantially enlarged without overwhelming the original historic building.

five children, Elizabeth, studied painting in Paris, France, later becoming a professional artist and well-known teacher in Milton. Elizabeth Bastedo was active in St. Paul's Church and its Sunday School for 65 years.

David Hornell purchased this cottage in 1920; three years later it became home to his son, James and his wife, Leo Annie (Liddle). They raised their family here and Leo remained for decades following her husband's death, her friendliness making her well-known to countless people in the com-

munity. Leo was a member of the Rebekah Lodge, which celebrated its 95th anniversary in April 2000.

In recent years the building has undergone substantial changes, beginning with Pamela King, who owned the property until the mid-1990s.

The present owners are Don and Ann Corker, formerly of Campbellville. After buying the house from Pamela they carried out extensive renovations to the entire structure and added an addition at the rear before moving in.

LACAC Heritage Inventory Description

MILTON L.A.C.A.C. HERITAGE INVENTORY	
BUILDING TYPE: Residential	INVENTORY #:
ADDRESS: 94 Victoria St.	
BUILDING NAME:	
ORIGINAL USE: Housing	CONSTRUCTED:
PRESENT USE: Housing	
DESIGNATION:	DATE:
HISTORY	
This house was most likely built in the early 1850's for Jane McCann.	
ARCHITECTURAL COMMENTS	
<p>WALLS: A single one storey brick house with four bays, panels and a chimney.</p> <p>ROOF: A medium hip roof with projecting eaves, plain fascia and soffit.</p> <p>WINDOWS: Tall windows with flat heads, wooden sashes, stone lug sills.</p> <p>DOORWAYS: Central doorway with wood trim, single light transom, single door with four panels and glass.</p> <p>PORCHES: Single step.</p> <p>OTHERS:</p>	

Physical Heritage Attributes

- The original three bay one story historic house with low-hip roof, square plan with rubble stone wall foundation.



Historical House 2006



View along Victoria Street, 2020



View along Victoria Street, 2022



Elevation along Victoria Street, 2023



View along Victoria Street, 2023



View Along Victoria Street, 2023

Physical Heritage Attributes

- The original three bay one story historic house with low-hip roof, square plan with rubble stone wall foundation.



Backyard



South (Rear) Elevation showing additions



South Elevation (1995 additions)



West Elevation (1995 additions)



Page 87 of 365
West Elevation (Original)



East Elevation (Original and Addition Interface)

- **Physical Heritage Attributes**

Centre porch entrance with deep eave trim, decorative frieze and plain soffit, double plain wood posts with decorative motifs



Centre Porch Entrance



Decorative Motifs Details



Double Plain Wood Post

Physical Heritage Attributes

Single Leaf Four Panels Door with rectangular transom



Central Entrance door



Rectangular transom above door



Single Leaf Four Panels Door with glass inserts

Physical Heritage Attributes

- Pug (hand pressed) bricks laid in a Flemish bond on the front façade with common bond being used on its less prominent sides and unique brick pilasters between windows.



Flemish Bond



Page 90 of 365
Brick Pilasters

Running Bond

Physical Heritage Attributes

- Large double sash, six over six windows with stone lug sills



East Elevation Windows

West Elevation Window Page 91 of 365 Front Elevation Window

West Elevation Window



The Corporation of the Town of Milton

Report To: Council

From: Jill Hogan, Commissioner, Development Services

Date: December 18, 2023

Report No: DS-064-23

Subject: Recommendation Report - Notice of Intention to Designate - 200 Martin Street - Walter Dickin House

Recommendation: THAT Staff Report DS-064-23 entitled: “Notice of Intention to Designate - 200 Martin Street - Walter Dickin House be received;

THAT Milton Council recognizes the historic house at 200 Martin Street in the Town of Milton as being of heritage significance;

THAT Milton Council designate the property under Part IV of the Ontario Heritage Act, R.S.O. 1990, c. O.18 for the reasons outlined in the Reasons for Designation attached as Appendix 1 to this Report;

AND THAT the Town Clerk provides the Notice of Intention to Designate as outlined in Section 29 (4) of the Ontario Heritage Act;

AND FURTHER THAT once the thirty-day objection period has expired and if there are no objections, a designation by-law is brought forward for Council adoption.

EXECUTIVE SUMMARY

- 200 Martin Street is a two-storey brick building with a wrap-around verandah, unique decorative brick tiles, and enhanced “voussoirs extradados” (arches). Likely built in 1894, the property is an example of a late Victorian house transitioning into the Edwardian architectural style.
- The property's current owner has voluntarily responded to the heritage designation program and desires that their property be designated.
- This historic home is a significant built heritage resource for the Town of Milton and should be designated under Part IV of the Ontario Heritage Act (See Appendix '1').
- This significant heritage resource fulfils more than two of the evaluation criteria set out in Part IV of the Ontario Heritage Act (R.S.O. 1990), Ontario Regulation 9/06 (See

EXECUTIVE SUMMARY

Appendix 2). As such, it is worthy of designation under the provisions of the Ontario Heritage Act.

REPORT

Background

200 Martin Street is a two-storey brick house that fronts onto Martin Street. The property contains a rear wing with a low hip roof. Built in 1894, the property is an example of a late Victorian house transitioning into the Edwardian architectural style. It has the smooth red brick, minimal ornamentation and box-like, two-storey massing characteristic of the Edwardian Classicism style.

The building at the rear of the property, originally a coach house, was converted into four rental units in 1967 and has lost its historical attributes and value.

Discussion

Historically, the Crown granted this property to John and Mary Dempsey in 1836. They were one of the earliest settlers in Milton. Their land was known as “Winding Sixteen Farm.” John and Mary were natives of County Armagh, Ireland and had six children. Their son, George Dempsey, opened a dry goods grocery, and hardware store at 168-184 Main Street East in 1855. George served as a member of the Milton Council in 1860 & 1861. The land stayed in the Dempsey family until the property was inherited by two nieces, Mary Patton and Matilda Patton.

The subject property was sold in 1893 to Walter B. Dickin and his wife, Elizabeth Marie, who built this house in 1894 and, likely, the barn-like structure (coach house) at the rear of the property. Mr. Dickin operated a butcher business at 188 Main Street and owned a building behind Mary Street, which he used as a stable for the business. In 1948, Harold Graham (Paddy) Wilson became its owner. Paddy owned and operated a butcher shop on Main Street and a slaughterhouse on the outskirts of Town. Mr. Dickin and Mr. Wilson's names are honoured on this house by the Milton Historical Society's plaque program.

Physically, the two-story Edwardian rectangular plan brick house sits on a stone plinth foundation. The roof is medium hip with brick chimneys, projecting eaves, plain fascia and soffits. The house is adorned with decorative frieze and roof brackets and corbels. The exterior smooth red bricks are of running bond and accented with unique decorative tile brick

Discussion

below the stone lug sills. A sympathetic extension was added to the rear of the building. The segmented arched brick voussoirs window openings have unique decorative extrados and display a high degree of craftsmanship in both design and materials. Windows are double-hung (initially with shutters), wooden sashes and plain stone lug sills. The main entrance is off-centre, with a two-leaf, four-paneled door with two upper glass inserts and a rectangular transom above the door. The wrapped-around verandah has tapered columns on brick pedestals, open railings and straight steps.

Character defining elements/heritage attributes for this property are:

- A two-storey brick Victorian/Edwardian-style house with a brick chimney.
- Medium hip roof with projecting eaves, plain fascia and soffits, decorative frieze brackets and corbels.
- Exterior smooth red bricks accented with decorative tile brick below stone lug sills.
- Windows openings have segmental voussoirs with ornamentat extrados above.
- Double-hung windows (initially with shutters), wooden sashes and plain stone slug sills.
- Entrance is off-centre with a two-leaf panelled door with two upper glass inserts and a rectangular transom
- Open wrapped-around verandah with tapered columns on brick pedestals, open railings and straight steps.

Staff Recommendation

Staff recommends that the optimal conservation and protection measures for this heritage property is the designation of the property.

Financial Impact

There is no financial impact associated with this report.

Respectfully submitted,

Jill Hogan
Commissioner, Development Services



For questions, please contact: Anthony Wong, Senior Policy Planner Phone: Ext. 2565

Attachments

- Appendix '1'_Reasons for Designation for 200 Martin Street_ Walter Dickin House
- Appendix '2'_CHVI Evaluation_200 Martin Street
- Appendix '3'_Photographic Record Heritage Attributes_ 200 Martin Street

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.



Legal Description

Concession 2 New Trafalgar Survey, Part of lot 15

Description of Property

200 Martin Street is a two-storey brick house that fronts onto Martin Street. The property contains a rear wing with a low hip roof. Built in 1894, the property is an example of a late Victorian house transitioning into the Edwardian architectural style. It has the smooth red brick, minimal ornamentation and box-like, two-storey massing characteristic of the Edwardian Classicism style.

Statement of Cultural Heritage Value and Interest

Historical or Associative Value

Historically, the Crown granted this property to John and Mary Dempsey in 1836. They were one of the earliest settlers in Milton. Their land was known as "Winding Sixteen Farm." John and Mary were natives of County Armagh, Ireland and had six children. Their son, George Dempsey, opened a dry goods grocery, and hardware store at 168-184 Main Street East in 1855. George served as a member of the Milton Council in 1860 & 1861. The land stayed in the Dempsey family until the property was inherited by two nieces, Mary Patton and Matilda Patton (spinsters).

The subject property was sold in 1893 to Walter B Dickin and his wife, Elizabeth Marie, who built this house in 1894 and, likely, the barn-like structure (coach house) at the rear of the property. Mr. Dickin operated a butcher business at 188 Main Street and owned a building behind Mary Street, which he used as a stable for the business. In 1948, Harold Graham (Paddy) Wilson became its owner. Paddy owned and operated a butcher shop on Main Street and a slaughterhouse on the outskirts of the town. Mr. Dickin and Mr. Wilson's names are honoured on this house by the Historical Society of Milton Plaque program.

Physical or Design Value

Physically, the two-story Edwardian rectangular plan brick house sits on a stone plinth foundation. The roof is medium hip with brick chimneys, projecting eaves, plain fascia and soffits. The house is adorned with decorative frieze and roof brackets and corbels. The exterior smooth red bricks are of running bond and accented with unique decorative tile brick below the stone lug sills. A sympathetic extension was added to the rear of the building. The segmented arched brick voussoirs window openings have unique decorative extrados and display a high degree of craftsmanship in both design and materials. Windows are double-hung (initially with shutters), wooden sashes and plain stone lug sills. The main entrance is off-centre, with a two-leaf, four-paneled door with two upper glass inserts and a rectangular transom above the door. The wrapped-around verandah has tapered columns on brick pedestals, open railings and straight steps.

Character Defining Elements/Heritage Attributes

- A two-storey brick Victorian/Edwardian-style house with a brick chimney.
- Medium hip roof with projecting eaves, plain fascia and soffits, decorative frieze brackets and corbels.
- Exterior smooth red bricks accented with decorative tile brick below stone lug sills.
- Windows openings have segmental voussoirs with ornamentation above Extrados
- Double-hung windows (initially with shutters), wooden sashes and plain stone slug sills.
- Entrance is off-centre with a two-leaf panelled door with two upper glass inserts and a rectangular transom
- Open wrapped-around verandah with tapered columns on brick pedestals, open railings and straight steps.

Cultural Heritage Value or Interest Evaluation

Ontario Regulation 9/06 of the *Ontario Heritage Act* establishes the criteria for determining Cultural Heritage Value of Heritage Resources. A property must have the potential to meet at least two of the criteria to be considered to have heritage significance. These criteria fall into three categories: design or physical value, historical or associative value and contextual value. The following table considers and evaluates the subject property against these criteria.

Table 6: Evaluation of the Cultural Heritage Value of 200 Martin Street

The property has design value or physical value because it,		
	Criteria	Evaluation
i	is a rare, unique, representative or early example of a style, type, expression, material or construction method	The property is an excellent example of a late Victorian house transitioning into the Edwardian architectural style
ii	displays a high degree of craftsmanship or artistic merit	The segmented arched brick voussoir window openings have decorative extrados unique to late-19th-century styling and display a high degree of craftsmanship in both design and materials.
iii	demonstrates a high degree of technical or scientific achievement	The property does not demonstrate a high degree of technical or scientific achievement
The property has historical value or associative value because it,		
i	has direct associations with a theme, event, belief, person, activity, organization or institution that is significant to a community,	The Dempsey family was among the earliest Irish immigrants who settled in Milton.
ii	Yields or has the potential to yield, information that contributes to an understanding of a community or culture	Walter Dickin and Harlod Graham (Paddy) Wilson operated butcher shops on Main Street Milton.
iii	demonstrates or reflects the work or ideas of an architect, artist, builder, designer or theorist who is significant to a community	The subject property does not demonstrate or reflect that the subject property is associated with any known architect, builder or designer.
The property has contextual value because it,		
i	is important in defining, maintaining or supporting the character of an area	The property is not a tangible link to the character of the area.

ii	is physically, functionally, visually or historically linked to its surroundings	The property is not physically, functionally, visually or historically linked to its surroundings.
iii	is a landmark	The property is not a landmark.

Based on the above criteria, the subject property has significant cultural heritage value based on both design and contextual criteria. These attributes are sufficient to warrant Heritage Designation under the *Ontario Heritage Act*. However, designation may not be necessary at this time as the property is current listed on the Municipal Heritage Register, which offers it some protection from demolition.

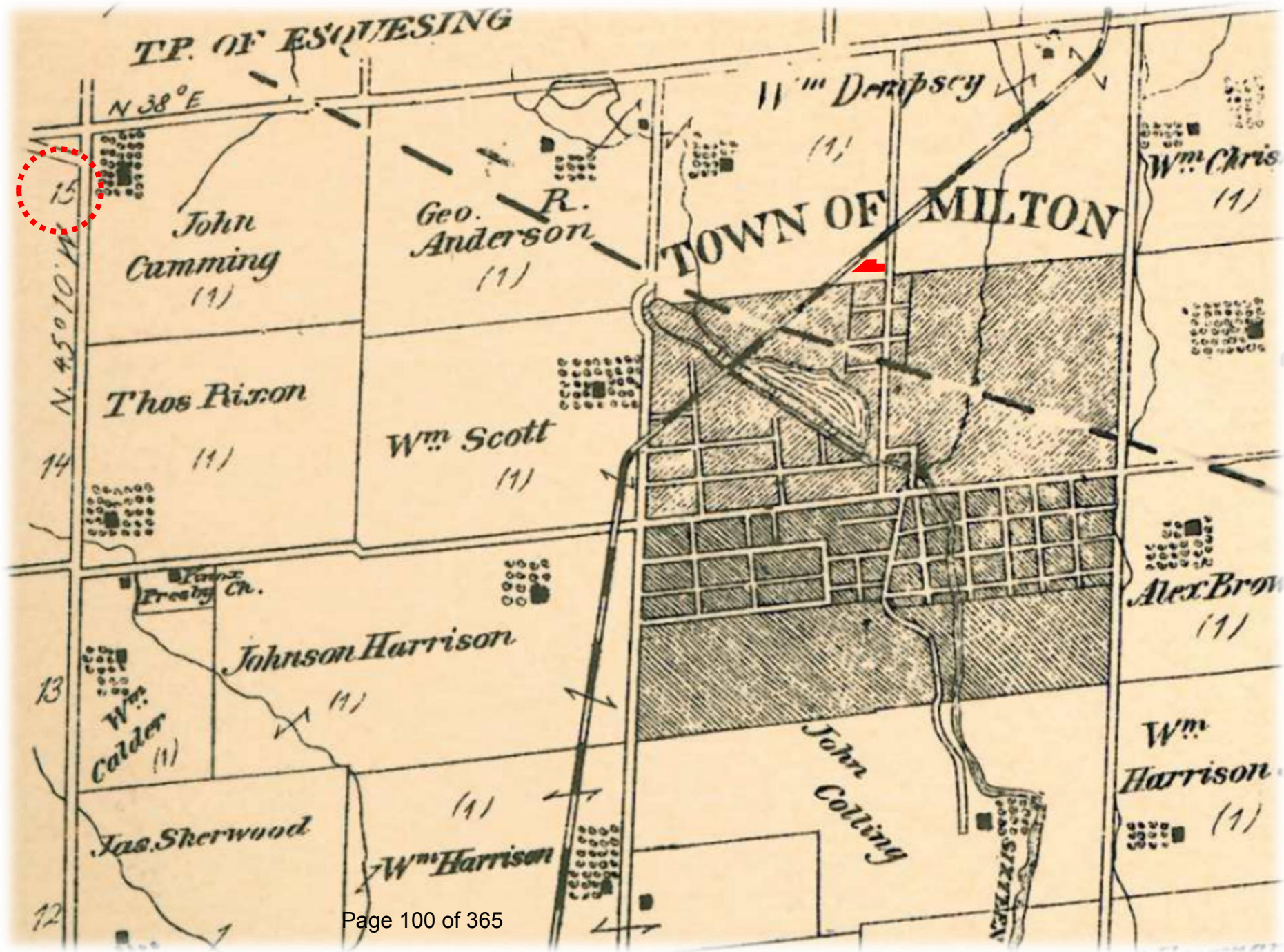


Appendix 3

Photographic Record _ Heritage Attributes _ 200 Martin Street

1877 Historical Atlas of Halton County

Northern Part of Trafalgar
Concession 2, Part of lot 15



Legal Description

Township of Trafalgar
Part of lot 15 concession 2,
New Survey

Historical Book

HALTON COUNTY (20),
TRAFALGAR, Book 38

5 July 1836
Crown to John Dempsey
100 acres
West Half

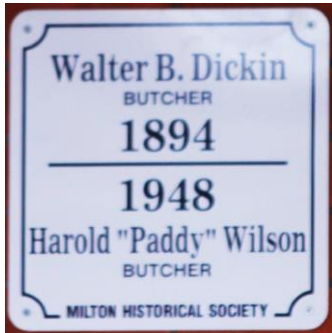
N.	INSTRUMENT.	DATE.	REGISTERED.	FROM	TO	ACRES.	DESCRIPTION, &c.
	Patent	5 July 1836		Crown	John Dempsey	100	W ¹ / ₂ .
333 B	Bond	21 July 1840		John Dempsey	Robert Ruxton	100	E ¹ / ₂ .
122 C	Quit Claim	27 Nov 1842	30 Dec 1842	Robert Ruxton	John Dempsey		part of lot 15, with privilege of water course
123 A	B & Sale	21 June 1842	30 Dec 1842	John Dempsey	William Dempsey	100	E ¹ / ₂ issuing to the timber.
205 G	"	21 June 1869	28 June 1869	John Dempsey	Joseph Martin		Right & privilege of damming back waters of Sexton's mill creek within channel of said creek on a part of lot 15. The dam to be of iron rods placed in channel & to divert waters into mill race, with certain amount. He with certain exceptions & reservation & charge
1099 J	Pro of Will	26 Sept 1868	12 Nov 1872	John Dempsey	Credit Valley Railway Co.	1700	front of lot 15. See deposit 1872
1467 K	B & Sale	7 July 1876	19 July 1876	William Dempsey	William Dempsey		her legacy as described in the will of her late beloved father
1468 L	Pro of Will	17 Nov 1872	30 March 1876	Mary Dempsey	William Dempsey	1700	part of W ¹ / ₂ .
2099 M	Release	20 Dec 1876	28 Dec 1876	Elizabeth Dempsey, Spinster	The Hamilton & N. W. R. Co.	6700	part of lot 15.
2100 N	B & Sale	26 Dec 1876	28 Dec 1876	William Dempsey	William Dempsey	100	W ¹ / ₂ . Subject to certain reservations and conditions.
2101 O	Release	18 Jan 1878	30 March 1878	Elizabeth Dempsey, Spinster and George Dempsey	Joseph Martin	21 1/2	part of E ¹ / ₂ with certain reservation & right of access &c. also reserved land owned & occupied by the C. & N. W. R. Co. And also doth grant all her estate right title and interest in all & singular that other certain parcel or part of land & premises particularly set forth in deed with certain rights & privileges. See description in Bond of 1876.
2661 P	B & Sale	27 March 1878	18 Jan 1879	William Dempsey (unmarried)	Joseph Martin		
107 Q	Bond	27 March 1878	30 July 1879	William Dempsey	Joseph Martin		
190 R	Mortgage	2 July 1880	2 July 1880	William Dempsey (a Bachelor)	Joseph Martin	100	E ¹ / ₂ . Reserve made excepting 20 acres
191 S	Quit Claim	18 Dec 1881	18 Dec 1881	John Dempsey (a Bachelor)	William Dempsey	50	N ¹ / ₂ of W ¹ / ₂ . Excepting that portion sold and conveyed by one of the Dempseys to the Hamilton Road Co.
192 T	Mortgage	22 Dec 1881	27 Dec 1881	William Dempsey	Joseph Martin	40	W ¹ / ₂ excepting 20 acres
193 U	B & Sale	5 Jan 1882	7 Jan 1882	William Dempsey (unmarried)	Joseph Martin	5 1/2	part of N ¹ / ₂ of W ¹ / ₂ with certain rights & privileges. Excepting certain reservation.
194 V	Mortgage	7 Jan 1882	7 Jan 1882	Joseph Martin	William Dempsey		Bond 2707 M.
195 W	Mortgage	19 Oct 1883	11 Nov 1883	William Dempsey	John Dempsey		N ¹ / ₂ of W ¹ / ₂ in Bond
196 X	Mortgage	22 Jan 1883	22 April 1883	Elizabeth Dempsey	William Dempsey	70	W ¹ / ₂ excepting certain portion
197 Y	Mortgage	22 Jan 1883	22 April 1883	William Dempsey	William Dempsey		N ¹ / ₂ of W ¹ / ₂ in Bond

Township of Trafalgar
 Part of lot 15 concession 2,
 North of Trafalgar, New Survey

Historical Book

HALTON COUNTY (20),
 TRAFALGAR, Book 38

16 Nov 1893
 Mary Ann and Matilda Patton to
 Walter B. Dickin
 2 3/4 acres part of
 West Half
 \$300



TOWNSHIP OF TRAFALGAR

LOT

15

CONCESSION

2

NUMBER	INSTRUMENT	DATE OF INSTRUMENT	DATE OF REGISTRATION	GRANTOR	GRANTEE	CONSIDERATION	REMARKS
4053 P	B ^y Sale	15 Apr 1889	22 Apr 1889	John Dempsey unmarried	Elizabeth Dempsey Spinster	\$3000	1/2 W ² of W ²
524 501	Probate of Will	30 Aug 1883	16 Dec 1889	Elizabeth Dempsey Spinster	her heirs Mary Ann Patton Matilda Preston Patton	-	Call Record of her estate Real Estate
6227 U	B ^y Sale	4 May 1893	16 Nov 1893	Mary Ann Patton & Matilda Preston Patton Spinster	Walter B. Dickin	\$300	2 3/4 ac pt of W ²
6722 "	B ^y Sale	9 Apr 1896	9 Apr 1896	Mary Ann Patton & Matilda Preston Patton Spinster	James W. Francis W Greenlee	\$3100	E ² 100 am. occup ^y 119 NW ² Tracts with all right etc. of part of 64 part 2 3/4 ac pt of W ²
7158 V	Deed	15 Nov 1891	15 Nov 1891	Maria Elizabeth Dickin Widow Thomas Edmund Parsons & John Dickin Exors. Walter B. Dickin	Walter A. Lawrence	\$1800	80 ac W ² except portion sold Cordier 7158 V.
8751 X	B ^y Sale	30 Oct 1905	15 Dec 1905	Mary Anne Patton Matilda Preston Patton Spinster	Jackson Agnew	-	80 ac W ² except portion sold Cordier 7158 V.
8869 X	Li ^q P ^{ro} dn	14 June 1906	14 June 1906	The Bank of Hamilton PEP	A. G. H. Luster Deft	-	2 3/4 ac pt of W ²
8971 Y	B ^y Sale	23 Feb 1905	14 Jan 1907	Walter Annan Lawrence wife	Charles Edward Galloway	\$2500	2 3/4 ac pt of W ²
8971 Y	B ^y Sale	14 Jan 1907	19 Jan 1907	Charles E. Galloway wife	John W Murray	\$3400	2 3/4 ac pt of W ²
9316 Y	By Law 579	21 Nov 1908	24 Nov 1908	The Council of Township of Trafalgar	Robert Ruxton Anderson	-	7. 2 nd ed. Rd. alle lot: 1st 2 nd 3 rd 4 th 5 th Unit borne in R. R. Anderson
9382 Y	B ^y Sale	10 Mar 1909	8 May 1909	Robert Ruxton Anderson wife	Charles W. Stanton Fred J. Stanton	\$250	1/2 Rd. alle other land

Historical Attributes

200 Martin Street

Part of Lot 15, Concession 2 • Trafalgar Township
Built approx. 1894

This property is located on what was part of the original crown land grant to John and Mary Dempsey, whose home was located just to the northwest of this property along the 16 Mile Creek.

Their land was known as, "Winding Sixteen Farm." John and Mary were natives of Ireland and had six children. The land stayed in the Dempsey name until two nieces, Mary Patton and Matilda Patton (spinners), inherited the property.

They sold this part of the property in 1893 to Walter B. Dickin and his wife, Elizabeth Marie, who had this house built and, likely, the barn-like structure (coach house) at the rear of the property. They raised two sons, Wallace and Harry, and three daughters, Mabel, Bessie and Lottie. Mr. Dickin operated a butcher business at 188 Main Street and owned a building behind on Mary Street, which he used as a stable for the business. Mr. Dickin died in 1896 at a young age.

The property was sold in 1898 to Walter A. Lawrence and his wife by the executives of Mr. Dickin's will. Mr. Lawrence retained ownership until 1905, when it was purchased by Charles E. Galloway and his wife, who in turn sold it two years later to John W. Murray and his wife.

John Murray and his wife, Isabella, were married February 1888. The couple had two children, a son, Robert, and a daughter, Mary Margaret Elizabeth (Bessie). Robert died as a young child and Bessie died in her early 30s.

Mr. Murray died suddenly in 1919, and a year later, the home was sold to Loimma and her husband, John J. Wilson.

Following the death of Loimma, the home was sold in 1948 to Mary Ethel Isabel and Harold Graham (Paddy) Wilson, who retained ownership until it was sold in 1967. There does not appear to be a connection between the two Wilson families.

Isabel and Harold raised their five children, Walter, Shirley, Donald, Harold and Robert, in this home. Paddy owned and operated a butcher shop on Main Street and a slaughter house, located on the outskirts of town.

The next owners were Joan Marie and Paul Douglas Scott, who purchased the property in 1967, along with the old two-storey brick coach house at the back. They converted it into four rental units. The couple did a number of other renovation projects within and outside the home.

In 1973, the home was sold to Patricia E. and Peter Brigant. Pat and Peter were married in 1961 at Holy Rosary Church and raised two daughters and one son.

In 1981, it was purchased by Shirley and Clifford Tufford, who sold a year later to Diane and Neil Gilker. Two years later, in 1984, it was sold to Boake, "Snooker" and her husband James Meek. The Meek family included four children, David, Michael, Hope and Dorothy.

In 2013, this home was sold to Lisa and Francois (Frank) Roy. They raised one daughter, April, and one son, Wess.



About the House

This house is an example of a late Victorian house that is transitioning into the Edwardian architectural style that became popular in the early 20th Century. It has the smooth red brick, minimal ornamentation and box-like, two-storey massing characteristic of Edwardian Classicism style. However, the porch does not feature stout, classical columns and chunky railings that are common features of this style. In addition, the window opening sizes and arched brick voussiors reflect late-19th Century styling.

MILTON L.A.C.A.C. HERITAGE INVENTORY

BUILDING TYPE:	Residential	INVENTORY #:
ADDRESS:	200 Martin St.	
BUILDING NAME:		
ORIGINAL USE:	Housing	CONSTRUCTED:
PRESENT USE:	Housing	
DESIGNATION:		DATE:

HISTORY

This fine brick house may have been built in 1890.

ARCHITECTURAL COMMENTS

WALLS: A single two storey brick house with decorative brick pattern, stone plinth foundation and a rear extension.

ROOF: A medium hip roof with projecting eaves, plain fascia, soffit, decorative frieze and brackets.

WINDOWS: Windows are segmental with fancy voussiors, double-hung with shutters, wooden sashes and plain lug sills.

DOORWAYS: Off-centre door with two leafs, shaped panels, glass, multiple light transom and wood trim.

PORCHES: Open wrap-around verandah with doric piers on brick pedestals, metal upper trim open railing and straight steps.

OTHERS:



- H Historical
- A Additions
- P Verandah



Context Existing Built heritage Resources

- **Physical Heritage Attributes**

A two storey brick Victorian/Edwardian Style house with brick chimney.



East Elevation along Martin Street, 1991



East Elevation along Martin Street, 2016



East Elevation along Martin Street, 2023



East Elevation along Martin Street, 2022



East Elevation along Martin Street, 2022



South (Side Elevation), 2023

Physical Heritage Attributes

Decorative accent brick below lug sills



Upper Floor decorative brick tiles below lug sills



Lower Floor decorative brick tiles below lug sills



Page 106 of 365
Location of decorative brick tiles



Location of Brick tiles along Front Elevation

Physical Heritage Attributes

Open wrapped around verandah with trimmed tapered post on brick pedestals, upper trim open railings and straight steps



Wrapped Around Porch 2019



Wrapped Around Porch 2023



Wrapped Around Porch entrance at front elevation



Second entrance to porch at south elevation



Page 107 of 365
Verandah



Tapered Columns

Physical Heritage Attributes

Single and double sash windows with segmented arch brick voussoirs and decorative extrados



Carve relief on Window transom

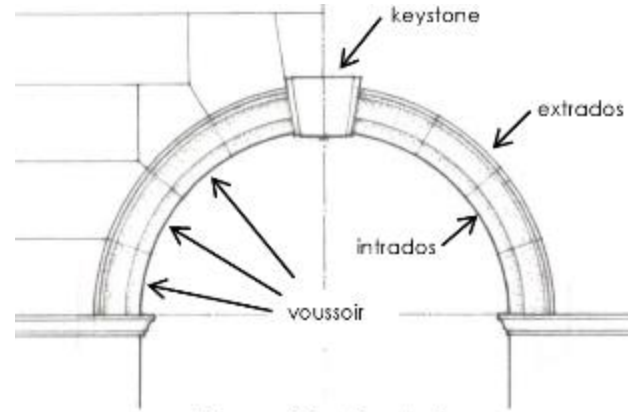


Figure 4.1 – the Arch

Brick Details



Single Sash Window



Double Sash Windows on ground Floor



Page 108 of 365
Windows on South Elevation



Decorative Brick Voussoirs and Extrados

Physical Heritage Attributes
Decorative frieze brackets and corbels



Roof Corbels



Roof Brackets locations



Roof Brackets details



Roof Corbels



Page 109 of 365
Corners at corner



Roof Corbels

- **Physical Heritage Attributes**

Medium hip roof, two stone chimneys, projecting eaves and decorative frieze



East Elevation along Martin Street



Second Chimney seen from the rear elevation



Chimneys seen from the south elevation



East Elevation along Martin Street



Page 110 of 365
East Elevation along Martin Street



Chimney seen from Martin Street

Physical Attributes

Two Leafs, four panels door with rectangular transform and upper glazed insert



Porch Entrance

Page 111 of 365



Two Leaf, four panels door with rectangular transform and upper glazed insert

198 Martin (formerly Coach House) severely altered



South elevation



North elevation



West Elevation



East Elevation at Deck



Page 112 of 365
East elevation



East Elevation



The Corporation of the Town of Milton

Report To: Council

From: Glen Cowan, Chief Financial Officer / Treasurer

Date: December 18, 2023

Report No: CORS-059-23

Subject: Capital and Operating Financial Statements - October 2023

Recommendation: **THAT report CORS-059-23 covering the capital and operating financial statements as at October 31, 2023, be received for information.**

EXECUTIVE SUMMARY

Capital and operating financial statements as at October 31, 2023 are attached for informational purposes.

REPORT

Background

In accordance with the approved Budget Management Policy (policy no. 113), the attached financial statements are being submitted for informational purposes to report on the capital and operating budgets as at October 31, 2023.

Discussion

The attached financial statements are provided for information purposes. A detailed review and report on variances to budget is completed for the month ends of May, September and December for the Operating fund and June and December for the Capital fund.

The most recent detailed review of the Operating fund was based on the September year to date balances and reported to Council through staff report CORS-054-23. That review suggested that the operating fund would be in a deficit of \$123,523 for year end, primarily related to a shift in the timing of planning applications and the Town's winter maintenance activities.

The financial position of the Town will continue to change throughout the balance of the year due to factors, winter maintenance activity, further shifts in the timing of planning applications, increased pressure on rates as contracts are renewed, utility and fuel usage and rates, and position vacancies.



Discussion

The Capital Budget has seen \$19.8 million invested in infrastructure since August. At October month end, the approved budget for capital projects totaled \$483 million, of which \$297 million (61%) had been spent to date (before commitments).

Financial Impact

These statements reflect entries booked to the end of October 2023. The statements are presented on a cash basis and therefore exclude accruals.

Respectfully submitted,

Glen Cowan
Chief Financial Officer / Treasurer

For questions, please contact: Shirley Xie

Phone: 905-878-
7252 Ext. 2472

Attachments

Appendix A: Capital and Operating Financial Statements as at October 30, 2023

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

**TOWN OF MILTON
CAPITAL FINANCIAL STATEMENT**

October 2023

Current Year Capital

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
EX Executive Services						
Active	\$1,567,176	\$96,000	\$1,663,176	\$722,146	43%	\$941,030
Total EX Executive Services	\$1,567,176	\$96,000	\$1,663,176	\$722,146	43%	\$941,030
CO Corporate Services						
Active	\$32,205,823	\$2,639,852	\$34,845,675	\$17,721,835	51%	\$17,123,841
Total CO Corporate Services	\$32,205,823	\$2,639,852	\$34,845,675	\$17,721,835	51%	\$17,123,841
CM Community Services						
Active	\$148,737,222	\$3,880,570	\$152,617,792	\$76,998,160	50%	\$75,619,632
Completed Pending Warranty	\$1,331,290	(\$108,799)	\$1,222,491	\$1,199,313	98%	\$23,179
Total CM Community Services	\$150,068,512	\$3,771,771	\$153,840,283	\$78,197,472	51%	\$75,642,811
DV Development Services						
Active	\$219,750,099	\$23,255,662	\$243,005,761	\$155,241,396	64%	\$87,764,365
Completed Pending Warranty	\$45,855,421	(\$932,234)	\$44,923,187	\$42,565,526	95%	\$2,357,661
Total DV Development Services	\$265,605,520	\$22,323,429	\$287,928,949	\$197,806,922	69%	\$90,122,026
LB Library						
Active	\$4,163,568	\$576,470	\$4,740,038	\$2,192,682	46%	\$2,547,356
Total LB Library	\$4,163,568	\$576,470	\$4,740,038	\$2,192,682	46%	\$2,547,356
Total Current Year Capital	\$453,610,599	\$29,407,522	\$483,018,121	\$296,641,057	61%	\$186,377,063

**TOWN OF MILTON
CAPITAL FINANCIAL STATEMENT
October 2023**

Executive Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
EX Executive Services						
Active						
Office of the CAO						
Office of the CAO						
Milton Education Village	\$99,207		\$99,207	\$25,402	26%	\$73,805
Strategic Plan Delivery	\$739,425		\$739,425	\$192,321	26%	\$547,104
Tourism Strategy	\$152,625		\$152,625	\$2,625	2%	\$150,000
Service Delivery	\$258,750	\$96,000	\$354,750	\$340,687	96%	\$14,063
Council Staff Work Plan	\$317,169		\$317,169	\$161,112	51%	\$156,057
Total Office of the CAO	\$1,567,176	\$96,000	\$1,663,176	\$722,146	43%	\$941,030
Total Office of the CAO	\$1,567,176	\$96,000	\$1,663,176	\$722,146	43%	\$941,030
Total Active	\$1,567,176	\$96,000	\$1,663,176	\$722,146	43%	\$941,030
Total EX Executive Services	\$1,567,176	\$96,000	\$1,663,176	\$722,146	43%	\$941,030
Total Executive Services	\$1,567,176	\$96,000	\$1,663,176	\$722,146	43%	\$941,030

TOWN OF MILTON
CAPITAL FINANCIAL STATEMENT
October 2023

Corporate Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
CO Corporate Services						
Active						
Corporate Services						
Finance						
Legislated Development Charge Exemptions	\$3,185,450	\$680,160	\$3,865,610	\$4,157,247	108%	(\$291,637)
Special Financial Studies	\$483,313		\$483,313	\$191,658	40%	\$291,655
Development Charges Study	\$258,750		\$258,750	\$180,592	70%	\$78,158
Asset Management Plan	\$180,250		\$180,250	\$40,703	23%	\$139,547
User Fee Update	\$77,250		\$77,250	\$2,250	3%	\$75,000
PSAB Legislative Changes	\$30,900		\$30,900	\$900	3%	\$30,000
Total Finance	\$4,215,913	\$680,160	\$4,896,073	\$4,573,350	93%	\$322,723
Human Resources						
Compensation Plan	\$123,600		\$123,600	\$57,340	46%	\$66,260
Employee Strategic Development	\$380,256		\$380,256	\$124,391	33%	\$255,865
Health and Safety Audit/Implementation	\$161,071		\$161,071	\$23,396	15%	\$137,675
Workplace Accommodation	\$15,450		\$15,450	\$1,748	11%	\$13,702
Total Human Resources	\$680,377		\$680,377	\$206,874	30%	\$473,503
Information Technology						
Technology Strategic Plan	\$392,697		\$392,697	\$180,221	46%	\$212,476
Technology Replacement/Upgrade	\$890,208		\$890,208	\$615,490	69%	\$274,718
Phone System Changes/Upgrade	\$180,093	\$59,452	\$239,545	\$48,592	20%	\$190,953
PC Workstation Complement Changes	\$25,155		\$25,155	\$1,528	6%	\$23,627
E-Services Strategy Implementation	\$258,389	\$132,706	\$391,095	\$45,616	12%	\$345,479
GIS/Geosmart Infrastructure	\$422,469		\$422,469	\$176,590	42%	\$245,879
Application/Software Upgrades	\$377,258		\$377,258	\$54,910	15%	\$322,348
Photocopiers	\$59,740		\$59,740	\$1,740	3%	\$58,000
Radio Communications Backup Upgrades	\$2,297,084		\$2,297,084	\$302,015	13%	\$1,995,069
Milton Air Photo Mapping	\$20,963		\$20,963	\$7,508	36%	\$13,455
Enterprise Content Management	\$604,934		\$604,934	\$192,813	32%	\$412,121
Enterprise Contact Management	\$221,350	\$49,599	\$270,949	\$60,162	22%	\$210,787
Emergency Operations Centre	\$89,091	\$20,681	\$109,772	\$2,595	2%	\$107,177
Mobile Parking Enforcement	\$778,608	\$26,064	\$804,672	\$339,943	42%	\$464,729
Human Resources Information System	\$4,944,176	\$137,376	\$5,081,552	\$3,189,885	63%	\$1,891,667
Microsoft 365 Migration	\$294,479		\$294,479	\$8,577	3%	\$285,902
Automatic Vehicle Locator and Road Patrol	\$294,812		\$294,812	\$8,901	3%	\$285,911
Department Specific Tech Initiatives	\$3,918,435	\$589,433	\$4,507,868	\$2,986,637	66%	\$1,521,231
Council Technology	\$51,500		\$51,500	\$7,269	14%	\$44,231
Property Tax System Replacement	\$2,124,324	(\$1,031,092)	\$1,093,232	\$206,737	19%	\$886,495
Citizen Portal Implementation	\$533,358		\$533,358	\$15,535	3%	\$517,823
Financial Enterprise Systems	\$342,932	\$1,327,217	\$1,670,149	\$30,286	2%	\$1,639,863
Fire Department Emergency Systems	\$107,013	\$369,259	\$476,272	\$3,117	1%	\$473,155
Facility Infrastructure and Networking	\$4,092,822	\$156,885	\$4,249,707	\$2,736,499	64%	\$1,513,208
Technology Infrastructure Initiative	\$1,880,919		\$1,880,919	\$560,196	30%	\$1,320,723
Enterprise Licencing and Compliance	\$1,506,912		\$1,506,912	\$767,056	51%	\$739,856
Audit & Accountability Fund - Phase 3 Intake		\$122,112	\$122,112	\$122,112	100%	
Total Information Technology	\$26,709,721	\$1,959,692	\$28,669,413	\$12,672,530	44%	\$15,996,883
Legislative & Legal Services						
Taxi, Uber, Ride Strategy	\$28,490		\$28,490	\$25,987	91%	\$2,503
Council Orientation Program	\$21,115		\$21,115	\$1,115	5%	\$20,000
Impact on Regulatory Framework	\$84,048		\$84,048	\$2,448	3%	\$81,600
Total Legislative & Legal Services	\$133,653		\$133,653	\$29,550	22%	\$104,103
Marketing & Government Relations						

**TOWN OF MILTON
CAPITAL FINANCIAL STATEMENT**

October 2023

Corporate Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
Branding	\$466,159		\$466,159	\$239,530	51%	\$226,629
Total Marketing & Government Relations	\$466,159		\$466,159	\$239,530	51%	\$226,629
Total Corporate Services	\$32,205,823	\$2,639,852	\$34,845,675	\$17,721,835	51%	\$17,123,841
Total Active	\$32,205,823	\$2,639,852	\$34,845,675	\$17,721,835	51%	\$17,123,841
Total CO Corporate Services	\$32,205,823	\$2,639,852	\$34,845,675	\$17,721,835	51%	\$17,123,841
Total Corporate Services	\$32,205,823	\$2,639,852	\$34,845,675	\$17,721,835	51%	\$17,123,841

TOWN OF MILTON
CAPITAL FINANCIAL STATEMENT
October 2023

Community Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
CM Community Services						
Active						
Community Services						
Administration						
Parks Master Plan Update	\$263,339		\$263,339	\$83,726	32%	\$179,613
Recreation Master Plan (DC)	\$82,473		\$82,473	\$2,402	3%	\$80,071
Service Strategy	\$50,875	\$48,637	\$99,512	\$64,356	65%	\$35,156
FOACM Children's Program Fundraising Campaign				\$1,344,003	#DIV/0!	(\$1,344,003)
Trails Master Plan Update	\$46,004		\$46,004	\$30,258	66%	\$15,746
Climate Change & Mitigation	\$69,886		\$69,886	\$9,092	13%	\$60,794
Facility Roof Assessments	\$61,800	(\$9,486)	\$52,314	\$41,339	79%	\$10,975
Total Administration	\$574,377	\$39,151	\$613,528	\$1,575,176	257%	(\$961,648)
Parks Redevelopment						
Omagh Park Redevelopment	\$905,367	(\$830)	\$904,537	\$860,704	95%	\$43,833
Tennis Court Upgrades	\$93,645		\$93,645	\$66,756	71%	\$26,889
New Campbellville Park Redevelopment	\$832,058	\$86,232	\$918,290	\$890,259	97%	\$28,031
Beaty Trail Park Redevelopment	\$74,064	(\$1,951)	\$72,113	\$27,230	38%	\$44,883
Kingsleigh Park Redevelopment	\$569,728		\$569,728	\$564,738	99%	\$4,990
Moorelands Park Redevelopment	\$344,348	(\$4,733)	\$339,615	\$322,791	95%	\$16,824
Baldwin Park Redevelopment	\$479,266	(\$1,930)	\$477,336	\$201,136	42%	\$276,200
Chris Hadfield Park Redevelopment	\$767,640	\$186,873	\$954,513	\$939,780	98%	\$14,733
Trudeau Park Redevelopment	\$70,457	(\$904)	\$69,553	\$28,895	42%	\$40,658
Sunny Mount Park	\$324,608	(\$125)	\$324,483	\$227,355	70%	\$97,128
Community Park - Engbridge Gas Easement	\$167,333	(\$43,974)	\$123,359	\$67,124	54%	\$56,235
Park Improvements - Preservation	\$171,728		\$171,728	\$87,106	51%	\$84,622
Multi-Court Resurfacing - Preservation	\$77,303		\$77,303	\$2,252	3%	\$75,051
Implementation Trails Master Plan	\$64,931	\$29,199	\$94,130	\$54,444	58%	\$39,686
In Ground Waste Container Installation	\$160,907	(\$16,809)	\$144,098	\$106,721	74%	\$37,377
Park Amenity Audit	\$279,932	(\$63,720)	\$216,212	\$133,021	62%	\$83,191
Total Parks Redevelopment	\$5,383,315	\$167,328	\$5,550,643	\$4,580,312	83%	\$970,331
Parks Growth						
Community Park - External to Boyne	\$310,101	\$203,821	\$513,922	\$417,258	81%	\$96,664
Jannock Property Master Plan	\$401,718	\$30,000	\$431,718	\$82,092	19%	\$349,626
Community Park Detailed Development	\$3,949,817	(\$697,662)	\$3,252,155	\$3,225,979	99%	\$26,177
Sherwood District Park	\$930,818	(\$129,085)	\$801,733	\$778,794	97%	\$22,939
Escarpment View Lands (Formerly CMHL Prpoerty)	\$282,357		\$282,357	\$8,224	3%	\$274,133
District Park West - Boyne	\$762,398	(\$41,696)	\$720,702	\$78,351	11%	\$642,351
Boyne Village Square #3	\$387,827	\$3,720	\$391,547	\$363,759	93%	\$27,788
Cobban Neighbourhood Park - Boyne	\$2,130,490	(\$29,020)	\$2,101,470	\$1,957,549	93%	\$143,921
Walker Neighbourhood Park - Boyne	\$2,674,647	(\$72,940)	\$2,601,707	\$589,221	23%	\$2,012,486
Derry Green Union Gas Pipeline Easement	\$36,050		\$36,050	\$3,291	9%	\$32,759
Total Parks Growth	\$11,866,223	(\$732,862)	\$11,133,361	\$7,504,519	67%	\$3,628,842
Facilities Redevelopment						
Corporate Office Furniture	\$198,222	\$91,197	\$289,419	\$169,298	58%	\$120,122
Indoor Fitness Equipment	\$43,476		\$43,476	\$36,672	84%	\$6,804
Civic Facility Improvements	\$4,316,687	\$166,921	\$4,483,608	\$3,005,128	67%	\$1,478,480
Heritage Property Restoration	\$274,336	\$338,158	\$612,494	\$290,085	47%	\$322,409
Accessibility Improvements	\$318,675		\$318,675	\$9,338	3%	\$309,337
Leisure Centre Upgrades	\$1,241,386	(\$179,988)	\$1,061,398	\$704,861	66%	\$356,537
Memorial Arena Facility Improvements	\$321,748	(\$3,278)	\$318,470	\$306,143	96%	\$12,327
Tonelli Sports Centre Improvements	\$560,015	(\$216,709)	\$343,306	\$245,369	71%	\$97,937
Milton Sports Centre Upgrades	\$2,555,991	(\$264,569)	\$2,291,422	\$1,830,575	80%	\$460,848

TOWN OF MILTON
CAPITAL FINANCIAL STATEMENT
October 2023

Community Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
Mattamy National Cycling Centre Improvements	\$2,430,882	(\$313,673)	\$2,117,209	\$1,133,798	54%	\$983,411
MNCC Renewable Energy System Feasibility	\$35,278		\$35,278	\$1,028	3%	\$34,250
Senior Centre Asset Restorations	\$95,288		\$95,288	\$6,823	7%	\$88,465
Milton Indoor Turf Centre Improvements	\$540,619		\$540,619	\$15,746	3%	\$524,873
FirstOntario Arts Centre Milton Facility Improvements	\$795,612	(\$26,337)	\$769,275	\$318,743	41%	\$450,532
Brookville Yard	\$195,492	(\$17,923)	\$177,569	\$16,706	9%	\$160,863
Civic Operations Centre Facility Improvements	\$362,542	\$5,891	\$368,433	\$176,574	48%	\$191,859
Facility Parking Area Improvements	\$184,595		\$184,595	\$20,679	11%	\$163,916
Fire Halls Facility Improvements	\$996,560	(\$53,750)	\$942,810	\$422,623	45%	\$520,187
Electric Vehicle Charging Stations Strategy	\$160,907		\$160,907	\$4,687	3%	\$156,220
Total Facilities Redevelopment	\$15,628,311	(\$474,058)	\$15,154,253	\$8,714,876	58%	\$6,439,378
Facilities Growth						
Town Hall Construction/Expansion	\$604,975		\$604,975	\$19,975	3%	\$585,000
Civic Precinct		\$1,500,000	\$1,500,000			\$1,500,000
Indoor Soccer - Air Supported	\$221,963		\$221,963	\$3,808	2%	\$218,155
Sherwood Community Centre	\$42,385,963	\$949,066	\$43,335,029	\$39,231,516	91%	\$4,103,514
Seniors Centre Expansion	\$239,110		\$239,110	\$3,710	2%	\$235,400
Civic Operations Centre	\$1,239,732		\$1,239,732	\$36,491	3%	\$1,203,241
Transit Operations Centre	\$49,558,811		\$49,558,811	\$1,491,368	3%	\$48,067,443
Branch No. 2 Building	\$7,000,586	(\$334,588)	\$6,665,998	\$4,994,713	75%	\$1,671,285
Main Library Expansion	\$570,130		\$570,130	\$74,294	13%	\$495,836
Total Facilities Growth	\$101,821,270	\$2,114,478	\$103,935,748	\$45,855,874	44%	\$58,079,874
Transit						
Transit						
Transit Study Update	\$221,151		\$221,151	\$68,795	31%	\$152,356
Transit Bus Pads	\$69,625	\$36,053	\$105,678	\$40,591	38%	\$65,087
Total Transit	\$290,776	\$36,053	\$326,829	\$109,385	33%	\$217,444
Transit Fleet Replacement						
Transit Bus Non Growth: Refurbishment	\$1,131,875		\$1,131,875	\$642,620	57%	\$489,255
Total Transit Fleet Replacement	\$1,131,875		\$1,131,875	\$642,620	57%	\$489,255
Transit Fleet Growth						
Non-Fixed Route Bus	\$402,540		\$402,540	\$11,724	3%	\$390,816
Total Transit Fleet Growth	\$402,540		\$402,540	\$11,724	3%	\$390,816
Total Transit	\$1,825,191	\$36,053	\$1,861,244	\$763,729	41%	\$1,097,515
Fire						
Fire Fleet Equipment - Replacement						
Aerial Replacement/Refurbishment	\$73,725		\$73,725	\$33,282	45%	\$40,443
Training Vehicle Replacement	\$78,020		\$78,020	\$60,467	78%	\$17,553
Chief Officers Vehicle	\$78,020		\$78,020	\$89,406	115%	(\$11,386)
Rescue Truck Replacement/Refurbishment	\$38,295	\$1,214,508	\$1,252,803	\$83,228	7%	\$1,169,575
Pumper/Rescue Units Refurbishment	\$131,115		\$131,115	\$105,328	80%	\$25,787
Replace Rehab Van	\$133,900		\$133,900	\$3,900	3%	\$130,000
Total Fire Fleet Equipment - Replacement	\$533,075	\$1,214,508	\$1,747,583	\$375,611	21%	\$1,371,972
Fire Fleet Equipment - Growth Related						
Pumper/Rescue Growth	\$884,650	\$26,763	\$911,413	\$912,095	100%	(\$682)
Emergency Vehicle Technician Equipment	\$26,935		\$26,935	\$25,666	95%	\$1,269
Total Fire Fleet Equipment - Growth Related	\$911,585	\$26,763	\$938,348	\$937,762	100%	\$587
Fire - Replacement						
Breathing Apparatus Replacement	\$38,625		\$38,625	\$17,448	45%	\$21,177
Defibrillators Replacement	\$32,960		\$32,960	\$960	3%	\$32,000
Special Operations Equipment Replacement	\$25,750		\$25,750	\$24,013	93%	\$1,737
Thermal Image Camera Replacement	\$20,600		\$20,600	\$600	3%	\$20,000

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Community Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
Bunker Gear Replacement - Employee Turnover	\$100,454		\$100,454	\$100,593	100%	(\$139)
Hazardous Material Equipment Replacement	\$25,750		\$25,750	\$750	3%	\$25,000
Firefighting Hose Replacement	\$20,600		\$20,600	\$600	3%	\$20,000
Fire Prevention Equipment Replacement	\$56,650		\$56,650	\$33,009	58%	\$23,641
Battery & Radio Parts Replacement	\$15,450		\$15,450	\$11,526	75%	\$3,924
Firefighting Equipment Replacement	\$22,660		\$22,660	\$21,180	93%	\$1,480
Total Fire - Replacement	\$359,499		\$359,499	\$210,679	59%	\$148,820
Fire - Growth						
Specialized Equipment Training Structure - Growth	\$72,821		\$72,821	\$22,794	31%	\$50,027
Bunker Gear and Recruit Package - Growth	\$133,063		\$133,063	\$94,572	71%	\$38,491
Vehicle Extrication Equipment Growth	\$188,278		\$188,278	\$174,877	93%	\$13,401
Total Fire - Growth	\$394,162		\$394,162	\$292,243	74%	\$101,919
Total Fire	\$2,198,321	\$1,241,271	\$3,439,592	\$1,816,294	53%	\$1,623,298
Operations						
Fleet Equipment - Replacement						
Fleet Strategy	\$180,250	\$96,414	\$276,664	\$149,399	54%	\$127,265
1 Ton Crew Dump Trucks	\$190,365	\$113,016	\$303,381	\$187,880	62%	\$115,501
1/2 Ton Pick up Replacement	\$100,288	\$4,902	\$105,190	\$2,921	3%	\$102,269
3/4 Ton Pick-ups Replacement	\$143,383	\$7,938	\$151,321	\$77,748	51%	\$73,573
Tandem Axle Dump Truck	\$1,445,356	\$946,560	\$2,391,916	\$771,753	32%	\$1,620,163
Enforcement Vehicles	\$57,409	(\$2,891)	\$54,518	\$51,015	94%	\$3,503
Sign Truck	\$750,759	\$28,324	\$779,083	\$100,089	13%	\$678,994
Haul All/Packer	\$159,465	(\$29,623)	\$129,842	\$127,842	98%	\$2,000
Multifunction Tractor	\$401,022	\$43,844	\$444,866	\$432,369	97%	\$12,497
Tractor Attachments	\$71,377		\$71,377	\$2,079	3%	\$69,298
Trackless Front Mower Deck	\$132,643	\$74	\$132,717	\$117,635	89%	\$15,082
Zero Turning Radius Mowers	\$320,330	\$21,895	\$342,225	\$342,223	100%	\$2
Ball Diamond Groomer	\$48,644	(\$8,159)	\$40,485	\$1,417	4%	\$39,068
Landscape Trailer	\$28,227		\$28,227	\$21,527	76%	\$6,700
Gator Utility Vehicle - Replacement	\$84,111		\$84,111	\$2,450	3%	\$81,661
Ice Resurfacer	\$113,300	\$92,601	\$205,901	\$3,300	2%	\$202,601
Total Fleet Equipment - Replacement	\$4,226,929	\$1,314,895	\$5,541,824	\$2,391,648	43%	\$3,150,176
Fleet Equipment - Growth Related						
1 Ton Dump Trucks - Growth	\$411,832	\$84,661	\$496,493	\$123,339	25%	\$373,154
Tandem Axle Trucks	\$540,884	\$66,305	\$607,189	\$314,690	52%	\$292,499
Zero Radius Mowers	\$49,584	\$4,369	\$53,953	\$53,952	100%	\$1
Tractors, Loaders & Back Hoes	\$639,149	\$5,964	\$645,113	\$623,625	97%	\$21,488
Fleet Mechanic Equipment	\$38,625	\$2,091	\$40,716	\$40,716	100%	-
Haul All/Packer	\$274,506	(\$501)	\$274,005	\$98,569	36%	\$175,436
Facility Maintenance Pick-Up	\$52,943	\$11,424	\$64,367	\$1,542	2%	\$62,825
Total Fleet Equipment - Growth Related	\$2,007,523	\$174,313	\$2,181,836	\$1,256,432	58%	\$925,404
Forestry						
EAB Implementation Strategy	\$139,926		\$139,926	\$67,715	48%	\$72,211
Total Forestry	\$139,926		\$139,926	\$67,715	48%	\$72,211
Surface Treatment Program						
Surface Treatment Program	\$3,065,836		\$3,065,836	\$2,471,585	81%	\$594,251
Total Surface Treatment Program	\$3,065,836		\$3,065,836	\$2,471,585	81%	\$594,251
Total Operations	\$9,440,214	\$1,489,208	\$10,929,422	\$6,187,380	57%	\$4,742,042
Total Community Services	\$148,737,222	\$3,880,570	\$152,617,792	\$76,998,160	50%	\$75,619,632
Total Active	\$148,737,222	\$3,880,570	\$152,617,792	\$76,998,160	50%	\$75,619,632
Completed Pending Warranty Community Services						

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Community Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
Parks Redevelopment						
Coulson Park Redevelopment	\$352,110	(\$15,652)	\$336,458	\$327,085	97%	\$9,373
Coxe Park Redevelopment	\$509,332	(\$43,002)	\$466,330	\$456,148	98%	\$10,182
Beaty Neighbourhood Park Redevelopment	\$413,803	(\$133,193)	\$280,610	\$278,138	99%	\$2,472
Sam Sherratt Trail Redevelopment	\$56,045	\$83,048	\$139,093	\$137,941	99%	\$1,152
Total Parks Redevelopment	\$1,331,290	(\$108,799)	\$1,222,491	\$1,199,313	98%	\$23,179
Total Community Services	\$1,331,290	(\$108,799)	\$1,222,491	\$1,199,313	98%	\$23,179
Total Completed Pending Warranty	\$1,331,290	(\$108,799)	\$1,222,491	\$1,199,313	98%	\$23,179
Total CM Community Services	\$150,068,512	\$3,771,771	\$153,840,283	\$78,197,472	51%	\$75,642,811
Total Community Services	\$150,068,512	\$3,771,771	\$153,840,283	\$78,197,472	51%	\$75,642,811

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Development Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
DV Development Services						
Active						
Development Services Administration						
Development Services Administration						
Transportation Master Plan	\$272,064	\$10,000	\$282,064	\$86,777	31%	\$195,287
Development Eng & Parks Standards Manual	\$63,036	\$15,000	\$78,036	\$94,296	121%	(\$16,260)
Train Whistle Cessation Assessment		\$35,000	\$35,000	\$7,105	20%	\$27,895
Guiderail Inventory, Condition and Needs Assessment	\$104,288	(\$28,381)	\$75,907	\$44,870	59%	\$31,037
Retaining Wall Inventory and Condition Assessment	\$69,525	(\$7,607)	\$61,918	\$13,568	22%	\$48,350
Road Needs Study/Asset Management Plan for Roads	\$208,575	(\$33,424)	\$175,151	\$40,212	23%	\$134,939
Bridge Needs Study	\$83,430	(\$9,873)	\$73,557	\$52,615	72%	\$20,942
Total Development Services Administration	\$800,918	(\$19,285)	\$781,633	\$339,443	43%	\$442,190
Total Development Services Administration	\$800,918	(\$19,285)	\$781,633	\$339,443	43%	\$442,190
Infrastructure Management						
Urban Roads Redevelopment						
Bronte Street (Main St to Steeles Ave)	\$33,434,927	\$2,598,029	\$36,032,956	\$29,930,932	83%	\$6,102,025
Nipissing Road Redevelopment	\$1,822,485	(\$1,320,485)	\$502,000	\$247,161	49%	\$254,839
Bronte Street (Heslop to S. of Main)	\$2,560,779	(\$101,345)	\$2,459,434	\$1,814,460	74%	\$644,974
Jasper Street Reconstruction	\$624,546	\$81,576	\$706,122	\$129,795	18%	\$576,327
Asphalt Overlay Program	\$19,110,316	\$97,332	\$19,207,648	\$16,897,632	88%	\$2,310,016
High Point Drive (Hwy 25 to Parkhill Dr)	\$3,220,463		\$3,220,463	\$2,094,746	65%	\$1,125,717
Main St (Drew Centre to Thompson Rd)	\$1,116,910	\$141,891	\$1,258,801	\$153,929	12%	\$1,104,873
Total Urban Roads Redevelopment	\$61,890,426	\$1,496,999	\$63,387,425	\$51,268,655	81%	\$12,118,770
Urban Roads Growth						
Main St (Scott Blvd (incl. CNR Crossing) to Bronte St)	\$7,587,563	\$28,207	\$7,615,770	\$7,428,079	98%	\$187,691
Main St (JSP to 5th Line)/5th Line (Hwy 401 to Main St)	\$23,501,907	\$3,388,438	\$26,890,345	\$24,545,698	91%	\$2,344,646
Main Street (Fifth Line to Sixth Line)	\$591,282	\$411,416	\$1,002,698	\$30,076	3%	\$972,622
Thompson Road (Louis St Laurent to Derry Rd)	\$526,967	\$12,717	\$539,684	\$23,943	4%	\$515,741
5th Line (Hwy 401 to Derry Road)	\$41,483,803	\$815,132	\$42,298,935	\$26,158,235	62%	\$16,140,699
5th Line (Derry Road to Britannia Road)	\$20,639,542		\$20,639,542	\$864,505	4%	\$19,775,037
Louis St Laurent (Yates to 4th Line) formerly to Thompson Rd	\$14,208,877	(\$2,331,492)	\$11,877,385	\$11,862,819	100%	\$14,566
Louis St Laurent (James Snow Parkway to Fifth Line)		\$9,242,240	\$9,242,240	\$5,962,908	65%	\$3,279,333
Peru Road (Bridge Removal and Cul De Sac)	\$877,293		\$877,293	\$177,471	20%	\$699,822
Boulevard Works	\$895,369		\$895,369	\$61,406	7%	\$833,963
Total Urban Roads Growth	\$110,312,603	\$11,566,658	\$121,879,261	\$77,115,141	63%	\$44,764,119
Rural Roads Redevelopment						
Expanded Asphalt Program	\$5,380,576	(\$1,083,759)	\$4,296,817	\$2,888,221	67%	\$1,408,597
Appleby Line	\$2,716,430	\$2,011,437	\$4,727,867	\$3,292,657	70%	\$1,435,210
Milborough Line Rehabilitation	\$116,820		\$116,820	\$13,521	12%	\$103,299
Burnhamthorpe Rd Rehabilitation	\$179,739	\$35,047	\$214,786	\$34,156	16%	\$180,630
Campbellville Road - Guiderail Replacement	\$778,242	\$862,387	\$1,640,629	\$65,859	4%	\$1,574,770
Total Rural Roads Redevelopment	\$9,171,807	\$1,825,112	\$10,996,919	\$6,294,414	57%	\$4,702,505
Active Transportation - Redevelopment						
James Snow Parkway Multi-Use Path Replacement	\$68,598		\$68,598	\$1,998	3%	\$66,600
Total Active Transportation - Redevelopment	\$68,598		\$68,598	\$1,998	3%	\$66,600
Active Transportation - Growth						
Boyne Limestone Trails	\$697,043	\$21,225	\$718,268	\$288,431	40%	\$429,837
Boyne Pedestrian Railway Crossing	\$6,228,061	\$246,625	\$6,474,686	\$647,442	10%	\$5,827,244
Boyne Multiuse Asphalt Trails	\$467,033	\$573,319	\$1,040,352	\$601,657	58%	\$438,695
Boyne Pedestrian Bridge - Minor Crossing	\$39,162		\$39,162	\$1,141	3%	\$38,021
Total Active Transportation - Growth	\$7,431,299	\$841,169	\$8,272,468	\$1,538,671	19%	\$6,733,797
Bridges/Culverts Redevelopment						

**TOWN OF MILTON
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Development Services

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
Bridge/Culvert Rehabilitation Needs	\$1,073,926	\$232,267	\$1,306,193	\$767,249	59%	\$538,944
Kelso Road Bridge (Structure 74)	\$150,538	\$17,339	\$167,877	\$109,733	65%	\$58,144
25 SR Bridge - 0.1 km West of Guelph Line (Structure No. 62)	\$124,803		\$124,803	\$5,996	5%	\$118,807
Fourth Line Nassagaweya Bridge Replacement (Structure 112)	\$240,908		\$240,908	\$9,224	4%	\$231,684
Total Bridges/Culverts Redevelopment	\$1,590,175	\$249,606	\$1,839,781	\$892,202	48%	\$947,579
Storm Water Management Rehabilitation						
SWM Quality Master Plan	\$602,550		\$602,550	\$17,550	3%	\$585,000
Stormwater Pond Maintenance	\$962,322	(\$43,031)	\$919,291	\$643,317	70%	\$275,974
Mill Pond Rehabilitation	\$3,454,047		\$3,454,047	\$208,741	6%	\$3,245,306
Storm Sewer Network Study	\$205,849	\$33,449	\$239,298	\$185,349	77%	\$53,949
Storm Sewer Network Program	\$4,933,530	\$338,327	\$5,271,857	\$584,640	11%	\$4,687,217
Total Storm Water Management Rehabilitation	\$10,158,298	\$328,745	\$10,487,043	\$1,639,597	16%	\$8,847,446
Traffic						
Traffic Infrastructure	\$155,339		\$155,339	\$30,691	20%	\$124,648
Traffic Services Safety Review	\$193,111		\$193,111	\$13,883	7%	\$179,228
Pedestrian Crossover (PXO) Program	\$211,705		\$211,705	\$130,316	62%	\$81,389
Pedestrian Crossover Decision Warrant System		\$50,880	\$50,880			\$50,880
New Traffic Signals	\$376,352	(\$110,351)	\$266,001	\$13,635	5%	\$252,366
Preemption Traffic Control System	\$46,567		\$46,567	\$1,356	3%	\$45,211
Signal Interconnect Program	\$258,880		\$258,880	\$237,439	92%	\$21,441
Transport Canada Rail Regulations	\$537,718		\$537,718	\$282,114	52%	\$255,604
Preemption Traffic Control System	\$83,572		\$83,572	\$58,146	70%	\$25,426
Traffic Calming Study - Bronte/Main St		\$35,000	\$35,000			\$35,000
Traffic Calming	\$85,068	\$110,000	\$195,068	\$21,152	11%	\$173,916
Intersection Pedestrian Signal (LSL at Diefenbaker St/Hamman Way)	\$177,037		\$177,037	\$5,156	3%	\$171,881
Total Traffic	\$2,125,349	\$85,529	\$2,210,878	\$793,887	36%	\$1,416,991
Streetlighting						
Street Light Inventory and Condition Assessment	\$451,720		\$451,720	\$15,652	3%	\$436,068
Street Lighting	\$200,329		\$200,329	\$14,714	7%	\$185,615
Street Light / Pole / Underground Power Renewal	\$131,487		\$131,487	\$43,551	33%	\$87,936
Street Light LED Replacement	\$5,133,677	(\$2,147,673)	\$2,986,004	\$2,870,560	96%	\$115,444
Total Streetlighting	\$5,917,213	(\$2,147,673)	\$3,769,540	\$2,944,476	78%	\$825,064
Parking						
Downtown Parking Study	\$80,000	(\$4,101)	\$75,899	\$61,783	81%	\$14,116
Total Parking	\$80,000	(\$4,101)	\$75,899	\$61,783	81%	\$14,116
Total Infrastructure Management	\$208,745,768	\$14,242,044	\$222,987,812	\$142,550,825	64%	\$80,436,987
Development Engineering						
Storm Water Management Growth						
SWM Boyne	\$502,507	\$24,052	\$526,559	\$271,859	52%	\$254,700
SWM Derry Green (BP2)	\$343,448	\$15,206	\$358,654	\$193,020	54%	\$165,634
SWM Sherwood	\$328,364	\$10,000	\$338,364	\$58,681	17%	\$279,683
SWM Milton Education Village	\$255,853		\$255,853	\$36,423	14%	\$219,430
SWM North Porta	\$133,900		\$133,900	\$34,012	25%	\$99,888
Total Storm Water Management Growth	\$1,564,072	\$49,258	\$1,613,330	\$593,995	37%	\$1,019,335
Total Development Engineering	\$1,564,072	\$49,258	\$1,613,330	\$593,995	37%	\$1,019,335
Planning and Development						
Planning						
Official Plan Review	\$448,081	\$726,880	\$1,174,961	\$811,406	69%	\$363,555
Urban Design Guidelines	\$225,053		\$225,053	\$73,668	33%	\$151,385
Milton Heights OMB	\$203,500	\$1,591,902	\$1,795,402	\$1,759,863	98%	\$35,539
MEV Secondary Planning/Site Specific Zoning	\$550,417	\$910,208	\$1,460,625	\$1,307,614	90%	\$153,011
Proposed CN Intermodal Facility	\$253,500	\$410,000	\$663,500	\$227,567	34%	\$435,933

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	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
Urban Residential Secondary Plan Phase 4	\$1,442,652	\$1,976,723	\$3,419,375	\$2,760,519	81%	\$658,856
Sustainable Halton Subwatershed Study	\$2,230,000	\$258,209	\$2,488,209	\$2,268,198	91%	\$220,011
Sustainable Halton Land Base Analysis	\$242,888	\$399,662	\$642,550	\$322,585	50%	\$319,965
Britannia E/W - Secondary Plan	\$2,389,887	\$1,257,251	\$3,647,138	\$1,823,884	50%	\$1,823,254
Community Improvement Plan for CBD	\$107,711		\$107,711	\$3,170	3%	\$104,541
Zoning By-Law Review	\$295,460		\$295,460	\$9,961	3%	\$285,499
Building Public Portal Implementation		\$1,000,000	\$1,000,000	\$321,908	32%	\$678,092
Trafalgar Secondary Plan Application		\$450,000	\$450,000			\$450,000
Res/Non-Res Take Up/Land Needs Study	\$250,192	\$2,811	\$253,003	\$66,790	26%	\$186,213
Total Planning	\$8,639,341	\$8,983,645	\$17,622,986	\$11,757,133	67%	\$5,865,854
Total Planning and Development	\$8,639,341	\$8,983,645	\$17,622,986	\$11,757,133	67%	\$5,865,854
Total Active	\$219,750,099	\$23,255,662	\$243,005,761	\$155,241,396	64%	\$87,764,365
Completed Pending Warranty						
Infrastructure Management						
Storm Water Management Rehabilitation						
Stormwater Pond Maintenance	\$670,401	\$702,715	\$1,373,116	\$1,051,275	77%	\$321,841
Total Storm Water Management Rehabilitation	\$670,401	\$702,715	\$1,373,116	\$1,051,275	77%	\$321,841
Urban Roads Redevelopment						
Asphalt Overlay Program	\$9,828,147	(\$782,927)	\$9,045,220	\$8,898,294	98%	\$146,926
Wheelabrator Way - Including Culvert Replacement	\$1,698,327	\$1,057,773	\$2,756,100	\$2,692,049	98%	\$64,051
Victoria Street (Bronte to James St)	\$830,947	(\$453,195)	\$377,752	\$310,286	82%	\$67,466
Elizabeth Street (Victoria St to Main St)	\$1,340,152	(\$1,055,759)	\$284,393	\$216,373	76%	\$68,020
Total Urban Roads Redevelopment	\$13,697,573	(\$1,234,108)	\$12,463,465	\$12,117,002	97%	\$346,463
Urban Roads Growth						
Main St (Scott Blvd (incl. CNR Crossing) to Bronte St)	\$3,052,500	\$3,743,586	\$6,796,086	\$6,626,782	98%	\$169,304
Louis St Laurent (4th Line to James Snow Parkway)	\$5,494,082	(\$3,457,712)	\$2,036,370	\$1,879,922	92%	\$156,448
Thompson Road (Britannia to Louis St Laurent)	\$12,110,740	\$411,969	\$12,522,709	\$11,854,169	95%	\$668,541
Total Urban Roads Growth	\$20,657,322	\$697,843	\$21,355,165	\$20,360,873	95%	\$994,292
Rural Roads Redevelopment						
Expanded Asphalt Program	\$7,050,159	(\$1,978,709)	\$5,071,450	\$4,740,383	93%	\$331,066
Campbell Ave (Glenda Jane Dr./Canyon Rd-Campbellville Rd.)	\$1,337,601	\$702,865	\$2,040,466	\$1,834,454	90%	\$206,012
Total Rural Roads Redevelopment	\$8,387,760	(\$1,275,844)	\$7,111,916	\$6,574,838	92%	\$537,078
Bridges/Culverts Redevelopment						
Bridge/Culvert Rehabilitation Needs	\$577,830	(\$139,172)	\$438,658	\$412,423	94%	\$26,235
Sixth Line Nassagaweya Culverts (Structures 113 and 118)	\$1,319,404	\$283,182	\$1,602,586	\$1,582,678	99%	\$19,908
Second Line Nassagaweya Bridge (Structure No. 63)	\$545,131	\$33,150	\$578,281	\$466,437	81%	\$111,844
Total Bridges/Culverts Redevelopment	\$2,442,365	\$177,160	\$2,619,525	\$2,461,538	94%	\$157,987
Total Infrastructure Management	\$45,855,421	(\$932,234)	\$44,923,187	\$42,565,526	95%	\$2,357,661
Total Completed Pending Warranty	\$45,855,421	(\$932,234)	\$44,923,187	\$42,565,526	95%	\$2,357,661
Total DV Development Services	\$265,605,520	\$22,323,429	\$287,928,949	\$197,806,922	69%	\$90,122,026
Total Development Services	\$265,605,520	\$22,323,429	\$287,928,949	\$197,806,922	69%	\$90,122,026

**TOWN OF MILTON
CAPITAL FINANCIAL STATEMENT**

October 2023

Library

	APPROVED BUDGET	BUDGET ADJUSTMENTS	REVISED BUDGET	LTD ACTUALS	% SPENT	VARIANCE LTD
LB Library						
Active						
Library						
Library						
Automation Replacement	\$323,984		\$323,984	\$84,457	26%	\$239,527
Collection - Replacement	\$918,368		\$918,368	\$533,807	58%	\$384,561
New Branch Equipment	\$60,660	\$251,328	\$311,988	\$287,439	92%	\$24,549
Collection - New	\$1,881,805		\$1,881,805	\$751,947	40%	\$1,129,858
Furniture Replacement	\$21,432		\$21,432	\$624	3%	\$20,808
Shelving - New	\$116,942	\$192,582	\$309,524	\$289,508	94%	\$20,016
Library Service Delivery Strategy Implementation	\$840,377		\$840,377	\$107,503	13%	\$732,874
E-Services Implementation		\$132,560	\$132,560	\$137,398	104%	(\$4,838)
Total Library	\$4,163,568	\$576,470	\$4,740,038	\$2,192,682	46%	\$2,547,356
Total Library	\$4,163,568	\$576,470	\$4,740,038	\$2,192,682	46%	\$2,547,356
Total Active	\$4,163,568	\$576,470	\$4,740,038	\$2,192,682	46%	\$2,547,356
Total LB Library	\$4,163,568	\$576,470	\$4,740,038	\$2,192,682	46%	\$2,547,356
Total Library	\$4,163,568	\$576,470	\$4,740,038	\$2,192,682	46%	\$2,547,356

**TOWN OF MILTON - SUMMARY
OPERATING FINANCIAL STATEMENT
October 2023**

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
MAYOR AND COUNCIL	515,641	523,797	643,301	7,645	650,946	(127,149)	80%
EXECUTIVE SERVICES	1,117,813	1,177,255	1,558,658	(26,139)	1,532,519	(355,264)	77%
CORPORATE SERVICES	7,587,246	9,662,566	12,782,738	(1,103,624)	11,679,114	(2,016,548)	83%
GENERAL GOVERNMENT	(60,209,998)	(71,790,186)	(64,469,399)	825,173	(63,644,226)	(8,145,960)	113%
COMMUNITY SERVICES	32,812,107	37,050,133	47,145,210	(570,351)	46,574,859	(9,524,726)	80%
DEVELOPMENT SERVICES	2,745,432	2,692,781	2,339,493	1,160,346	3,499,839	(807,058)	77%
LIBRARY	(1,087,556)	(1,191,747)		(151,231)	(151,231)	(1,040,516)	
HOSPITAL EXPANSION	(302,280)	(186,296)				(186,296)	
BIA	(206,616)	(146,674)		(18,296)	(18,296)	(128,378)	
Total TOWN OF MILTON	(17,028,211)	(22,208,371)		123,523	123,523	(22,331,894)	

**TOWN OF MILTON
OPERATING FINANCIAL STATEMENT
October 2023**

MAYOR AND COUNCIL

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
MAYOR AND COUNCIL							
MAYOR AND COUNCIL							
EXPENDITURES							
Salaries and Benefits	465,919	468,134	564,329		564,329	96,195	83%
Administrative	50,687	48,695	60,745	(5,000)	55,745	7,050	87%
Financial			5,000		5,000	5,000	
Purchased Goods	956	651	770		770	119	85%
Purchased Services	7,663	6,317	30,426	(325)	30,101	23,784	21%
Total EXPENDITURES	525,225	523,797	661,270	(5,325)	655,945	132,148	80%
REVENUE							
Financing Revenue			(5,000)		(5,000)	(5,000)	
Recoveries and Donations	(9,584)		(12,970)	12,970			
Total REVENUE	(9,584)		(17,970)	12,970	(5,000)	(5,000)	
Total MAYOR AND COUNCIL	515,641	523,797	643,300	7,645	650,945	127,148	80%
Total MAYOR AND COUNCIL	515,641	523,797	643,300	7,645	650,945	127,148	80%
Total MAYOR AND COUNCIL	515,641	523,797	643,300	7,645	650,945	127,148	80%

TOWN OF MILTON
OPERATING FINANCIAL STATEMENT
October 2023

EXECUTIVE SERVICES

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
EXECUTIVE SERVICES							
OFFICE OF THE CAO							
EXPENDITURES							
Salaries and Benefits	443,219	494,437	587,971		587,971	93,534	84%
Administrative	10,092	12,555	20,056	(2,000)	18,056	5,501	70%
Purchased Goods	8,229	7,495	5,507		5,507	(1,988)	136%
Purchased Services	8,712	8,612	49,528	(27,534)	21,994	13,382	39%
Total EXPENDITURES	470,252	523,099	663,062	(29,534)	633,528	110,429	83%
REVENUE							
Financing Revenue	(16,159)	(16,429)	(16,429)		(16,429)		100%
User Fees and Service Charges	(1,555)	(1,013)	(3,000)		(3,000)	(1,987)	34%
Total REVENUE	(17,714)	(17,442)	(19,429)		(19,429)	(1,987)	90%
Total OFFICE OF THE CAO	452,538	505,657	643,633	(29,534)	614,099	108,442	82%
STRATEGIC INITIATIVES AND ECONOMIC DEVELOPMENT							
EXPENDITURES							
Salaries and Benefits	649,631	713,439	891,314		891,314	177,875	80%
Administrative	9,378	11,125	23,537	(2,000)	21,537	10,412	52%
Financial		266	1,858	(1,000)	858	592	31%
Transfers to Own Funds	5,273	10,930	24,750	(15,000)	9,750	(1,180)	112%
Purchased Goods	3,591	4,147	8,336		8,336	4,189	50%
Purchased Services	89,261	44,506	190,028	(71,806)	118,222	73,716	38%
Reallocated Expenses	621	652	2,454		2,454	1,802	27%
Total EXPENDITURES	757,755	785,065	1,142,277	(89,806)	1,052,471	267,406	75%
REVENUE							
Financing Revenue	(10,197)	(29,083)	(85,108)	46,000	(39,108)	(10,025)	74%
Grants	(38,442)	(34,008)	(45,344)		(45,344)	(11,336)	75%
Recoveries and Donations	(25,000)						
User Fees and Service Charges	(18,842)	(50,375)	(96,799)	47,200	(49,599)	776	102%
Total REVENUE	(92,481)	(113,466)	(227,251)	93,200	(134,051)	(20,585)	85%
Total STRATEGIC INITIATIVES AND ECONOMIC DEVELOPMENT	665,274	671,599	915,026	3,394	918,420	246,821	73%
Total EXECUTIVE SERVICES	1,117,812	1,177,256	1,558,659	(26,140)	1,532,519	355,263	77%
Total EXECUTIVE SERVICES	1,117,812	1,177,256	1,558,659	(26,140)	1,532,519	355,263	77%

TOWN OF MILTON
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CORPORATE SERVICES

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
CORPORATE SERVICES							
FINANCE							
EXPENDITURES							
Salaries and Benefits	3,920,052	4,151,591	5,484,136	(302,085)	5,182,051	1,030,460	80%
Administrative	35,447	37,909	86,800	(30,900)	55,900	17,991	68%
Financial	5,445	4,021	5,406		5,406	1,385	74%
Purchased Goods	21,843	22,735	41,832	(2,000)	39,832	17,097	57%
Purchased Services	260,960	203,148	323,702	(64,031)	259,671	56,523	78%
Total EXPENDITURES	4,243,747	4,419,404	5,941,876	(399,016)	5,542,860	1,123,456	80%
REVENUE							
Financing Revenue	(2,734,149)	(2,622,763)	(2,726,344)	18,034	(2,708,310)	(85,547)	97%
Recoveries and Donations		306				(306)	
User Fees and Service Charges	(709,788)	(758,078)	(1,079,430)	36,475	(1,042,955)	(284,877)	73%
Reallocated Revenue	(168,897)	(218,942)	(333,466)		(333,466)	(114,524)	66%
Total REVENUE	(3,612,834)	(3,599,477)	(4,139,240)	54,509	(4,084,731)	(485,254)	88%
Total FINANCE	630,913	819,927	1,802,636	(344,507)	1,458,129	638,202	56%
INFORMATION TECHNOLOGY							
EXPENDITURES							
Salaries and Benefits	2,284,428	2,789,887	3,509,441	(295,721)	3,213,720	423,833	87%
Administrative	8,827	23,972	33,325	(1,232)	32,093	8,121	75%
Purchased Goods	1,459,697	2,255,287	2,456,460	(106,100)	2,350,360	95,073	96%
Purchased Services	1,068,565	1,063,106	1,490,022	(216,230)	1,273,792	210,686	83%
Total EXPENDITURES	4,821,517	6,132,252	7,489,248	(619,283)	6,869,965	737,713	89%
REVENUE							
Financing Revenue	(485,336)	(593,221)	(726,480)	85,445	(641,035)	(47,814)	93%
Grants				(37,408)	(37,408)	(37,408)	
Recoveries and Donations	58						
User Fees and Service Charges		(66)	(100)		(100)	(34)	66%
Reallocated Revenue	(64,732)	(94,178)	(126,740)		(126,740)	(32,562)	74%
Total REVENUE	(550,010)	(687,465)	(853,320)	48,037	(805,283)	(117,818)	85%
Total INFORMATION TECHNOLOGY	4,271,507	5,444,787	6,635,928	(571,246)	6,064,682	619,895	90%
HUMAN RESOURCES							
EXPENDITURES							
Salaries and Benefits	912,898	1,174,038	1,427,810	10,709	1,438,519	264,481	82%
Administrative	115,423	128,743	214,428	(34,500)	179,928	51,185	72%
Purchased Goods	30,036	2,236	5,857	(1,500)	4,357	2,121	51%
Purchased Services	126,113	127,263	173,428	(29,384)	144,044	16,781	88%
Total EXPENDITURES	1,184,470	1,432,280	1,821,523	(54,675)	1,766,848	334,568	81%
REVENUE							
Financing Revenue	(337,807)	(367,430)	(356,721)	(10,709)	(367,430)		100%
Reallocated Revenue	(123,401)	(137,244)	(171,194)		(171,194)	(33,950)	80%
Total REVENUE	(461,208)	(504,674)	(527,915)	(10,709)	(538,624)	(33,950)	94%
Total HUMAN RESOURCES	723,262	927,606	1,293,608	(65,384)	1,228,224	300,618	76%
LEGISLATIVE & LEGAL SERVICES							
EXPENDITURES							
Salaries and Benefits	2,392,394	2,537,896	3,440,325	(175,938)	3,264,387	726,491	78%
Administrative	26,596	43,621	74,169	(3,309)	70,860	27,239	62%
Financial	36,391	25,657	35,000	5,000	40,000	14,343	64%
Transfers to Own Funds		225,000	225,000		225,000		100%
Purchased Goods	15,712	15,060	27,999	(200)	27,799	12,739	54%
Purchased Services	931,740	843,977	861,406	87,793	949,199	105,222	89%

TOWN OF MILTON
OPERATING FINANCIAL STATEMENT
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CORPORATE SERVICES

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
Reallocated Expenses	91,013	162,916	111,467		111,467	(51,449)	146%
Total EXPENDITURES	3,493,846	3,854,127	4,775,366	(86,654)	4,688,712	834,585	82%
REVENUE							
Financing Revenue	(796,372)	(298,777)	(292,909)	(5,869)	(298,778)	(1)	100%
Recoveries and Donations	(87,498)	(10,419)	(21,500)		(21,500)	(11,081)	48%
User Fees and Service Charges	(1,208,182)	(1,744,794)	(2,392,051)	(3,000)	(2,395,051)	(650,257)	73%
Total REVENUE	(2,092,052)	(2,053,990)	(2,706,460)	(8,869)	(2,715,329)	(661,339)	76%
Total LEGISLATIVE & LEGAL SERVICES	1,401,794	1,800,137	2,068,906	(95,523)	1,973,383	173,246	91%
STRATEGIC COMMUNICATIONS							
EXPENDITURES							
Salaries and Benefits	714,024	815,783	1,032,403	(15,089)	1,017,314	201,531	80%
Administrative	10,567	20,754	22,984	2,000	24,984	4,230	83%
Purchased Goods	1,646	2,483	8,300		8,300	5,817	30%
Purchased Services	38,898	33,096	119,977	(13,877)	106,100	73,004	31%
Total EXPENDITURES	765,135	872,116	1,183,664	(26,966)	1,156,698	284,582	75%
REVENUE							
Financing Revenue	(203,263)	(202,003)	(202,003)		(202,003)		100%
Grants	(2,100)						
Total REVENUE	(205,363)	(202,003)	(202,003)		(202,003)		100%
Total STRATEGIC COMMUNICATIONS	559,772	670,113	981,661	(26,966)	954,695	284,582	70%
Total CORPORATE SERVICES	7,587,248	9,662,570	12,782,739	(1,103,626)	11,679,113	2,016,543	83%
Total CORPORATE SERVICES	7,587,248	9,662,570	12,782,739	(1,103,626)	11,679,113	2,016,543	83%

**TOWN OF MILTON
OPERATING FINANCIAL STATEMENT
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GENERAL GOVERNMENT

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
GENERAL GOVERNMENT							
GENERAL GOVERNMENT							
EXPENDITURES							
Salaries and Benefits	25,329	171				(171)	
Administrative	52,158	77,859	120,000		120,000	42,141	65%
Financial	4,333,640	4,793,934	5,328,957	58,290	5,387,247	593,313	89%
Transfers to Own Funds	34,057,116	36,391,446	44,817,917	1,671,522	46,489,439	10,097,993	78%
Purchased Services	252,088	182,665	88,865	134,243	223,108	40,443	82%
Reallocated Expenses	8,381						
Total EXPENDITURES	38,728,712	41,446,075	50,355,739	1,864,055	52,219,794	10,773,719	79%
REVENUE							
External Revenue Transferred to Reserves	(9,798,875)	(15,344,189)	(16,130,156)	(444,904)	(16,575,060)	(1,230,871)	93%
Financing Revenue	(7,181,174)	(7,583,017)	(6,139,400)	(1,978,911)	(8,118,311)	(535,294)	93%
Taxation	(77,347,252)	(85,147,393)	(85,427,006)	8,178	(85,418,828)	(271,435)	100%
Payments In Lieu	(1,020,098)	(1,041,432)	(1,028,464)	(12,967)	(1,041,431)	1	100%
Recoveries and Donations	(36,664)	106		(475)	(475)	(581)	(22%)
User Fees and Service Charges	(1,965,297)	(2,482,629)	(3,749,476)	1,390,197	(2,359,279)	123,350	105%
Reallocated Revenue	(1,589,349)	(1,637,708)	(2,350,636)		(2,350,636)	(712,928)	70%
Total REVENUE	(98,938,709)	(113,236,262)	(114,825,138)	(1,038,882)	(115,864,020)	(2,627,758)	98%
Total GENERAL GOVERNMENT	(60,209,997)	(71,790,187)	(64,469,399)	825,173	(63,644,226)	8,145,961	113%
Total GENERAL GOVERNMENT	(60,209,997)	(71,790,187)	(64,469,399)	825,173	(63,644,226)	8,145,961	113%
Total GENERAL GOVERNMENT	(60,209,997)	(71,790,187)	(64,469,399)	825,173	(63,644,226)	8,145,961	113%

TOWN OF MILTON
OPERATING FINANCIAL STATEMENT
October 2023

COMMUNITY SERVICES

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
COMMUNITY SERVICES							
RECREATION AND CULTURE FACILITIES							
EXPENDITURES							
Salaries and Benefits	3,952,140	4,922,093	6,291,765	(278,572)	6,013,193	1,091,100	82%
Administrative	16,453	20,825	40,021	(1,000)	39,021	18,196	53%
Financial	69,740	96,764	170,497	(62,669)	107,828	11,064	90%
Transfers to Own Funds	1,731,905	1,985,236	2,071,849		2,071,849	86,613	96%
Purchased Goods	323,726	523,528	856,987	(112,535)	744,452	220,924	70%
Purchased Services	3,394,060	3,743,233	6,245,587	(521,664)	5,723,923	1,980,690	65%
Reallocated Expenses	118,611	124,754	179,466		179,466	54,712	70%
Total EXPENDITURES	9,606,635	11,416,433	15,856,172	(976,440)	14,879,732	3,463,299	77%
REVENUE							
Financing Revenue	(282,398)	(312,993)	(395,117)	24,918	(370,199)	(57,206)	85%
Grants	(1,051,431)	(989,378)	(989,811)	(1,823)	(991,634)	(2,256)	100%
Recoveries and Donations	(55,748)	(60,651)	(75,947)	(22,766)	(98,713)	(38,062)	61%
User Fees and Service Charges	(4,321,084)	(5,210,584)	(7,720,261)	848,802	(6,871,459)	(1,660,875)	76%
Reallocated Revenue	(179,422)	(194,075)	(424,355)		(424,355)	(230,280)	46%
Total REVENUE	(5,890,083)	(6,767,681)	(9,605,491)	849,131	(8,756,360)	(1,988,679)	77%
RECREATION AND CULTURE FACILITIES	3,716,552	4,648,752	6,250,681	(127,309)	6,123,372	1,474,620	76%
ADMINISTRATION AND CIVIC FACILITIES							
EXPENDITURES							
Salaries and Benefits	2,492,039	2,917,384	3,850,360	(321,896)	3,528,464	611,080	83%
Administrative	31,888	23,076	50,838		50,838	27,762	45%
Financial	63,258	50,834	59,893		59,893	9,059	85%
Transfers to Own Funds	330,566	370,699	460,049	(71,201)	388,848	18,149	95%
Purchased Goods	53,619	52,680	89,685		89,685	37,005	59%
Purchased Services	1,123,086	1,133,560	1,647,204	(97,181)	1,550,023	416,463	73%
Reallocated Expenses	86,599	76,424	94,193		94,193	17,769	81%
Total EXPENDITURES	4,181,055	4,624,657	6,252,222	(490,278)	5,761,944	1,137,287	80%
REVENUE							
Financing Revenue	(1,155,761)	(1,062,540)	(1,647,141)	305,353	(1,341,788)	(279,248)	79%
Recoveries and Donations	(17,131)	(14,934)	(17,138)		(17,138)	(2,204)	87%
User Fees and Service Charges	(214,882)	(261,332)	(336,846)	(15,000)	(351,846)	(90,514)	74%
Total REVENUE	(1,387,774)	(1,338,806)	(2,001,125)	290,353	(1,710,772)	(371,966)	78%
ADMINISTRATION AND CIVIC FACILITIES	2,793,281	3,285,851	4,251,097	(199,925)	4,051,172	765,321	81%
PROGRAMS							
EXPENDITURES							
Salaries and Benefits	2,846,901	3,960,306	5,268,377	(503,049)	4,765,328	805,022	83%
Administrative	24,842	23,889	62,158	(21,010)	41,148	17,259	58%
Financial	116,156	216,270	584,955	197,000	781,955	565,685	28%
Transfers to Own Funds			23,350	55,000	78,350	78,350	
Purchased Goods	123,546	183,832	260,172	(26,404)	233,768	49,936	79%
Purchased Services	175,341	337,107	858,082	(277,515)	580,567	243,460	58%
Reallocated Expenses	43,141	116,785	83,161	38,750	121,911	5,126	96%
Total EXPENDITURES	3,329,927	4,838,189	7,140,255	(537,228)	6,603,027	1,764,838	73%
REVENUE							
Financing Revenue	(22,195)	(87,054)	(656,244)	(93,000)	(749,244)	(662,190)	12%
Grants	(48,000)	(65,398)	(68,421)	(3,491)	(71,912)	(6,514)	91%
Recoveries and Donations	(95,618)	(142,838)	(403,005)	111,661	(291,344)	(148,506)	49%
User Fees and Service Charges	(2,775,765)	(4,916,935)	(5,851,192)	260,078	(5,591,114)	(674,179)	88%
Reallocated Revenue	(5,058)	(1,850)	(6,500)	3,000	(3,500)	(1,650)	53%

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COMMUNITY SERVICES

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
Total REVENUE	(2,946,636)	(5,214,075)	(6,985,362)	278,248	(6,707,114)	(1,493,039)	78%
Total PROGRAMS	383,291	(375,886)	154,893	(258,980)	(104,087)	271,799	361%
OPERATIONS							
EXPENDITURES							
Salaries and Benefits	5,484,469	5,992,208	7,514,473	(38,480)	7,475,993	1,483,785	80%
Administrative	9,586	12,081	57,161	(1,765)	55,396	43,315	22%
Transfers to Own Funds	1,809,887	1,986,091	1,986,091		1,986,091		100%
Purchased Goods	1,278,348	1,507,174	1,878,929	35,744	1,914,673	407,499	79%
Purchased Services	4,954,198	5,379,391	7,964,707	143,500	8,108,207	2,728,816	66%
Fleet Expenses	1,112,627	1,378,086	1,326,890	145,000	1,471,890	93,804	94%
Reallocated Expenses	3,300,204	3,109,740	4,116,673		4,116,673	1,006,933	76%
Total EXPENDITURES	17,949,319	19,364,771	24,844,924	283,999	25,128,923	5,764,152	77%
REVENUE							
Financing Revenue	(133,200)	(225,826)	(279,764)	(49,548)	(329,312)	(103,486)	69%
Recoveries and Donations	(2,297,249)	(1,897,659)	(3,673,817)	496,836	(3,176,981)	(1,279,322)	60%
User Fees and Service Charges	(594,022)	(943,085)	(1,220,899)	(82,608)	(1,303,507)	(360,422)	72%
Reallocated Revenue	(3,712,203)	(3,615,234)	(4,563,839)	(61,153)	(4,624,992)	(1,009,758)	78%
Total REVENUE	(6,736,674)	(6,681,804)	(9,738,319)	303,527	(9,434,792)	(2,752,988)	71%
Total OPERATIONS	11,212,645	12,682,967	15,106,605	587,526	15,694,131	3,011,164	81%
TRANSIT							
EXPENDITURES							
Salaries and Benefits	283,580	366,531	446,095		446,095	79,564	82%
Administrative	10,040	9,975	18,531	(5,000)	13,531	3,556	74%
Financial			300		300	300	
Transfers to Own Funds	1,468,853	1,767,390	1,767,390		1,767,390		100%
Purchased Goods	4,371	14,356	13,778		13,778	(578)	104%
Purchased Services	3,415,822	4,315,895	5,822,654	695	5,823,349	1,507,454	74%
Fleet Expenses	1,098,470	1,351,303	2,149,883	(25,586)	2,124,297	772,994	64%
Reallocated Expenses	89,981	127,979	66,826	61,153	127,979		100%
Total EXPENDITURES	6,371,117	7,953,429	10,285,457	31,262	10,316,719	2,363,290	77%
REVENUE							
Financing Revenue	(977,940)	(978,132)	(978,132)		(978,132)		100%
Grants	(115,557)						
Recoveries and Donations	(104,944)	(713,709)	(784,496)	(105,933)	(890,429)	(176,720)	80%
User Fees and Service Charges	(630,695)	(968,732)	(1,160,188)	(43,336)	(1,203,524)	(234,792)	80%
Total REVENUE	(1,829,136)	(2,660,573)	(2,922,816)	(149,269)	(3,072,085)	(411,512)	87%
Total TRANSIT	4,541,981	5,292,856	7,362,641	(118,007)	7,244,634	1,951,778	73%
FIRE							
EXPENDITURES							
Salaries and Benefits	8,861,333	10,080,287	12,521,212	(441,890)	12,079,322	1,999,035	83%
Administrative	89,350	98,892	125,961	28,543	154,504	55,612	64%
Financial	3,692	4,349	3,000	2,500	5,500	1,151	79%
Transfers to Own Funds	1,048,572	1,106,306	1,106,306		1,106,306		100%
Purchased Goods	52,513	97,131	76,794	30,068	106,862	9,731	91%
Purchased Services	183,275	218,916	335,396	5,717	341,113	122,197	64%
Fleet Expenses	198,773	203,965	186,753	21,187	207,940	3,975	98%
Reallocated Expenses			453		453	453	
Total EXPENDITURES	10,437,508	11,809,846	14,355,875	(353,875)	14,002,000	2,192,154	84%
REVENUE							
Financing Revenue	(10,199)	(15,682)	(10,408)	(5,274)	(15,682)		100%
Grants	(4,900)	(18,068)	(2,500)	(82,772)	(85,272)	(67,204)	21%

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COMMUNITY SERVICES

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
Recoveries and Donations	(119,608)	(130,279)	(164,000)	(190)	(164,190)	(33,911)	79%
User Fees and Service Charges	(138,452)	(130,222)	(159,669)	(11,545)	(171,214)	(40,992)	76%
Total REVENUE	(273,159)	(294,251)	(336,577)	(99,781)	(436,358)	(142,107)	67%
Total FIRE	10,164,349	11,515,595	14,019,298	(453,656)	13,565,642	2,050,047	85%
Total COMMUNITY SERVICES	32,812,099	37,050,135	47,145,215	(570,351)	46,574,864	9,524,729	80%
Total COMMUNITY SERVICES	32,812,099	37,050,135	47,145,215	(570,351)	46,574,864	9,524,729	80%

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DEVELOPMENT SERVICES

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
DEVELOPMENT SERVICES							
PLANNING SERVICES							
EXPENDITURES							
Salaries and Benefits	1,588,911	1,810,060	2,446,846	(206,126)	2,240,720	430,660	81%
Administrative	15,321	25,764	50,509	(3,250)	47,259	21,495	55%
Purchased Services	85,550	51,578	56,934	25,726	82,660	31,082	62%
Total EXPENDITURES	1,689,782	1,887,402	2,554,289	(183,650)	2,370,639	483,237	80%
REVENUE							
Financing Revenue	(313,682)	(383,462)	(596,711)		(596,711)	(213,249)	64%
Recoveries and Donations	(25,103)	(22,485)	(54,200)	31,715	(22,485)		100%
User Fees and Service Charges	(1,505,527)	(1,647,382)	(2,853,534)	853,118	(2,000,416)	(353,034)	82%
Total REVENUE	(1,844,312)	(2,053,329)	(3,504,445)	884,833	(2,619,612)	(566,283)	78%
Total PLANNING SERVICES	(154,530)	(165,927)	(950,156)	701,183	(248,973)	(83,046)	67%
BUILDING SERVICES							
EXPENDITURES							
Salaries and Benefits	2,801,940	3,063,211	5,171,897	(1,427,100)	3,744,797	681,586	82%
Administrative	59,850	81,819	156,362	(25,146)	131,216	49,397	62%
Financial	(1)	(2)				2	
Transfers to Own Funds	9,549,567	590,890	3,989,862	(3,989,862)		(590,890)	
Purchased Goods	2,810	3,423	16,301	(9,000)	7,301	3,878	47%
Purchased Services	26,467	42,587	56,966	3,073	60,039	17,452	71%
Reallocated Expenses	1,618,830	1,747,831	2,720,794	(171,376)	2,549,418	801,587	69%
Total EXPENDITURES	14,059,463	5,529,759	12,112,182	(5,619,411)	6,492,771	963,012	85%
REVENUE							
Financing Revenue	(26,875)	(14,443)	(9,264)	(983,969)	(993,233)	(978,790)	1%
Recoveries and Donations		(3,562)		(3,562)	(3,562)		100%
User Fees and Service Charges	(14,032,589)	(5,393,660)	(12,102,915)	6,606,943	(5,495,972)	(102,312)	98%
Total REVENUE	(14,059,464)	(5,411,665)	(12,112,179)	5,619,412	(6,492,767)	(1,081,102)	83%
Total BUILDING SERVICES	(1)	118,094	3	1	4	(118,090)	2,952,350%
INFRASTRUCTURE MANAGEMENT							
EXPENDITURES							
Salaries and Benefits	1,666,366	1,756,656	2,480,624	(312,189)	2,168,435	411,779	81%
Administrative	22,817	22,652	38,018	(240)	37,778	15,126	60%
Financial	227,951	228,454	246,094		246,094	17,640	93%
Transfers to Own Funds	29,257	33,920	33,920		33,920		100%
Purchased Goods	49,409	27,522	67,702	1,371	69,073	41,551	40%
Purchased Services	1,242,266	1,553,781	2,115,944	(20,006)	2,095,938	542,157	74%
Reallocated Expenses	1,212		7,926		7,926	7,926	
Total EXPENDITURES	3,239,278	3,622,985	4,990,228	(331,064)	4,659,164	1,036,179	78%
REVENUE							
Financing Revenue	(810,714)	(1,008,248)	(1,394,473)	228,848	(1,165,625)	(157,377)	86%
Recoveries and Donations	(7,644)	(23,270)	(14,767)	(6,742)	(21,509)	1,761	108%
User Fees and Service Charges	(145,961)	(245,658)	(370,452)	(97,630)	(468,082)	(222,424)	52%
Total REVENUE	(964,319)	(1,277,176)	(1,779,692)	124,476	(1,655,216)	(378,040)	77%
Total INFRASTRUCTURE MANAGEMENT	2,274,959	2,345,809	3,210,536	(206,588)	3,003,948	658,139	78%
DEVELOPMENT ENGINEERING							
EXPENDITURES							
Salaries and Benefits	1,513,444	1,641,988	2,100,806		2,100,806	458,818	78%
Administrative	23,345	19,713	34,462		34,462	14,749	57%
Transfers to Own Funds		85,430		85,430	85,430		100%
Purchased Goods			200		200	200	

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DEVELOPMENT SERVICES

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
Purchased Services	102,773	64,594	323,142	(31,304)	291,838	227,244	22%
Total EXPENDITURES	1,639,562	1,811,725	2,458,610	54,126	2,512,736	701,011	72%
REVENUE							
Financing Revenue	(84,124)	(352,135)	(311,874)	(28,082)	(339,956)	12,179	104%
Recoveries and Donations	(14,842)	(40,139)	(77,570)		(77,570)	(37,431)	52%
User Fees and Service Charges	(1,273,627)	(1,430,764)	(2,425,237)	488,152	(1,937,085)	(506,321)	74%
Reallocated Revenue	(43,332)	(70,728)	(232,010)	171,376	(60,634)	10,094	117%
Total REVENUE	(1,415,925)	(1,893,766)	(3,046,691)	631,446	(2,415,245)	(521,479)	78%
Total DEVELOPMENT ENGINEERING	223,637	(82,041)	(588,081)	685,572	97,491	179,532	(84%)
ADMINISTRATION							
EXPENDITURES							
Salaries and Benefits	306,327	374,057	471,794		471,794	97,737	79%
Administrative	14,118	9,284	11,565		11,565	2,281	80%
Purchased Goods	9,521	10,837	37,950	(18,062)	19,888	9,051	54%
Purchased Services	176,376	220,028	247,969	36,438	284,407	64,379	77%
Total EXPENDITURES	506,342	614,206	769,278	18,376	787,654	173,448	78%
REVENUE							
Financing Revenue	(83,355)	(93,763)	(102,083)		(102,083)	(8,320)	92%
Recoveries and Donations	(21,616)	(43,336)		(37,942)	(37,942)	5,394	114%
User Fees and Service Charges		(257)		(257)	(257)		100%
Total REVENUE	(104,971)	(137,356)	(102,083)	(38,199)	(140,282)	(2,926)	98%
Total ADMINISTRATION	401,371	476,850	667,195	(19,823)	647,372	170,522	74%
Total DEVELOPMENT SERVICES	2,745,436	2,692,785	2,339,497	1,160,345	3,499,842	807,057	77%
Total DEVELOPMENT SERVICES	2,745,436	2,692,785	2,339,497	1,160,345	3,499,842	807,057	77%

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LIBRARY

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
LIBRARY							
LIBRARY							
EXPENDITURES							
Salaries and Benefits	2,868,136	3,222,723	4,158,747	(247,394)	3,911,353	688,630	82%
Administrative	45,246	51,856	53,629	2,000	55,629	3,773	93%
Financial	4,942	5,167	5,821		5,821	654	89%
Transfers to Own Funds	634,686	678,988	678,988		678,988		100%
Purchased Goods	291,188	383,113	372,983	65,214	438,197	55,084	87%
Purchased Services	382,704	329,899	534,031	(37,287)	496,744	166,845	66%
Reallocated Expenses	181,844	195,468	392,230		392,230	196,762	50%
Total EXPENDITURES	4,408,746	4,867,214	6,196,429	(217,467)	5,978,962	1,111,748	81%
REVENUE							
Financing Revenue	(18,919)	(21,696)	(21,696)		(21,696)		100%
Taxation	(5,308,486)	(5,901,548)	(5,901,548)		(5,901,548)		100%
Grants	(68,458)	(39,951)	(57,554)	(35,213)	(92,767)	(52,816)	43%
Recoveries and Donations	(14,724)	(15,035)	(14,596)	(3,622)	(18,218)	(3,183)	83%
User Fees and Service Charges	(85,719)	(80,732)	(201,037)	105,071	(95,966)	(15,234)	84%
Total REVENUE	(5,496,306)	(6,058,962)	(6,196,431)	66,236	(6,130,195)	(71,233)	99%
Total LIBRARY	(1,087,560)	(1,191,748)	(2)	(151,231)	(151,233)	1,040,515	
Total LIBRARY	(1,087,560)	(1,191,748)	(2)	(151,231)	(151,233)	1,040,515	
Total LIBRARY	(1,087,560)	(1,191,748)	(2)	(151,231)	(151,233)	1,040,515	

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HOSPITAL EXPANSION

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
HOSPITAL EXPANSION							
HOSPITAL EXPANSION							
EXPENDITURES							
Financial	2,199,287	2,312,960	2,499,256		2,499,256	186,296	93%
Total EXPENDITURES	2,199,287	2,312,960	2,499,256		2,499,256	186,296	93%
REVENUE							
Financing Revenue	(2,501,566)	(2,499,256)	(2,499,256)		(2,499,256)		100%
Total REVENUE	(2,501,566)	(2,499,256)	(2,499,256)		(2,499,256)		100%
Total HOSPITAL EXPANSION	(302,279)	(186,296)				186,296	
Total HOSPITAL EXPANSION	(302,279)	(186,296)				186,296	
Total HOSPITAL EXPANSION	(302,279)	(186,296)				186,296	

**TOWN OF MILTON
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BIA

	2022 YTD ACTUAL	2023 YTD ACTUAL	ANNUAL BUDGET	FORECAST CHANGES	FORECAST BUDGET	VARIANCE	PERCENT of BUDGET
BIA							
BIA							
EXPENDITURES							
Salaries and Benefits	122,098	168,104	173,391	26,300	199,691	31,587	84%
Administrative		22				(22)	
Financial	2,128	3,250	4,500	1,000	5,500	2,250	59%
Purchased Goods	21,999	14,864	13,500	7,530	21,030	6,166	71%
Purchased Services	118,197	146,587	209,096	29,111	238,207	91,620	62%
Reallocated Expenses	3,849	4,373	6,000	(1,200)	4,800	427	91%
Total EXPENDITURES	268,271	337,200	406,487	62,741	469,228	132,028	72%
REVENUE							
Financing Revenue	(36,604)	(29,740)	(29,740)		(29,740)		100%
Taxation	(244,727)	(258,162)	(258,086)		(258,086)	76	100%
Grants	(78,610)	(14,043)	(4,000)	(18,787)	(22,787)	(8,744)	62%
Recoveries and Donations	(63,592)	(55,394)	(26,500)	(23,500)	(50,000)	5,394	111%
User Fees and Service Charges	(18,206)	(18,123)	(18,500)		(18,500)	(377)	98%
Reallocated Revenue	(33,150)	(108,411)	(69,661)	(38,750)	(108,411)		100%
Total REVENUE	(474,889)	(483,873)	(406,487)	(81,037)	(487,524)	(3,651)	99%
Total BIA	(206,618)	(146,673)		(18,296)	(18,296)	128,377	
Total BIA	(206,618)	(146,673)		(18,296)	(18,296)	128,377	
Total BIA	(206,618)	(146,673)		(18,296)	(18,296)	128,377	



The Corporation of the Town of Milton

Report To: Council

From: Jill Hogan, Commissioner, Development Services

Date: December 18, 2023

Report No: DS-058-23

Subject: Public Meeting and Initial Report: Zoning By-law Amendment Application by CJJ Holdings Limited, applicable to lands known as Part Lot 5, Concession 2 (Esquesing). (Town File: Z-10/23)

Recommendation: **THAT Development Services Report DS-058-23 BE RECEIVED FOR INFORMATION.**

EXECUTIVE SUMMARY

Application has been made for an amendment to the Town of Milton Zoning By-law 016-2014, as amended, to rezone the subject lands from the current Future Development (FD) zone to a site specific Business Park (M1*XXX) zone to facilitate the development of two small bay industrial buildings. In general, these facilities are likely to be multi-tenanted, serving a broad mix of tenants in local distribution, construction, light industrial, and service industries.

The application is complete pursuant to the requirements of the Planning Act and is being processed accordingly. Upon completion of the consultation and review process, a Technical Report, including recommendations, will be brought forward for Council consideration. The Technical Report will address issues raised through the consultation and review process.

REPORT

Background

Owners: CJJ Holding Limited, 620 Wilson Avenue, Suite 300, Toronto, Ontario

Applicant/Agent: Clare Riepma, Riepma Consultants Inc., 220 Kempenfelt Drive, Barrie, Ontario

Location/Description: The subject lands are located in Ward 1, between No 5 Side Road and James Snow Parkway and are within the Milton 401 Industrial/Business Park Secondary Plan. Surrounding land uses include employment uses to the south and existing residential uses to the north. A Location Map is included as Figure 1 to this report.

Background

Proposal:

The applicant is seeking an amendment to the Town of Milton Zoning By-law 016-2014, as amended, to rezone the subject lands from the current Future Development (FD) zone to a site specific Business Park (M1*XXX) zone to accommodate the development of the lands for future employment uses.

Figure 2 and 3 illustrate the site plan and rendering of the proposed development. The development consists of two multi-tenant buildings, totally 18 units, with associated surface parking. Access is provided via a right-in/right-out on James Snow Parkway and a proposed full moves access onto No. 5 Side Road. It is noted that in May 2023, Town Council passed By-law 032-23 prohibiting Heavy Traffic along No. 5 Side Road. As such, all truck traffic will be required to use the James Snow Parkway access.

The following reports have been submitted in support of this application:

- Planning Justification Report, dated July 2023, prepared by Riepma Consultants Inc.
- Phase 1 Environmental Site Assessment - 7080 No 5 Sideroad, dated July 16, 2021, prepared by Terraprobe Inc.
- Phase 1 Environmental Site Assessment - 7188 No 5 Sideroad, dated July 16, 2021, prepared by Terraprobe Inc.
- Functional Servicing and Stormwater Management Report, dated November 25, 2022, prepared by MGM Consulting Inc.
- Arborist Report, dated November 2022, prepared by Beacon Environmental Limited.
- Scoped Environmental Impact Study, dated December 2022, prepared by Beacon Environmental Limited
- Geotechnical Investigation, dated October 2022, prepared by Soil Engineers Ltd.
- Hydrogeological Assessment, dated January 2022, prepared by Soil Engineers Ltd.
- Urban Design Brief, dated April 2023, prepared by Riepma Consultants Inc.
- Traffic Impact Study, dated September 14, 2023, prepared by GHD Limited.
- Noise Feasibility Study, dated February 3, 2023, prepared by HGC Engineering Ltd.
- Stage 1-2 Archaeological Assessment, dated February 2006, prepared by Archaeological Assessments Ltd.

Discussion

Planning Policy

The subject lands are located within the Milton 401 Industrial/Business Park Secondary Plan and are designated Business Park Area, as shown on Schedule C.2.B - Milton 401 Industrial/Business Park Secondary Plan Land Use Plan. The Business Park Area



Discussion

designation is an employment designation which applies to areas where the full range of light industrial and office uses will be permitted. The proposed Zoning By-law Amendment is seeking to rezone the subject lands to a site specific Business Park zone in accordance with the Official Plan direction.

While a full review of the applicable planning policies will be undertaken as part of the review of the application, based on the information provided, staff is satisfied that an Official Plan Amendment is not required.

Zoning By-law 016-2014, as amended

The subject lands are currently zoned Future Development (FD) zone under the Town's Zoning By-law 016-2014, as amended. As the FD zone does not permit development, a Zoning By-law Amendment has been made to rezone the lands to a site specific Business Park (M1*XXX) zone. The applicant has requested one site specific provision which proposes to deem James Snow Parkway as the front lot line.

The Draft Zoning By-law is attached as Appendix 1 to this Report.

Site Plan Control

Should the application be approved, the applicant will be required to receive Site Plan Approval prior to the commencement of any development.

Public Consultation and Review Process

Notice for the public meeting was provided pursuant to the requirements of the Planning Act on November 21, 2023. As well, signage providing information on the proposed applications was posted on all road frontages.

With regard to the proposal, staff has identified the following matters to be addressed through the review process:

- Urban Design
- Noise Impacts
- Traffic Impacts and No 5 Side Road access.

Key Milestones

Milestone	Date
Pre-Consultation Meeting	2/7/2023
Public Information Centre Meeting	N/A
Pre-Submission Review	5/16/2023



Milestone	Date
Application Deemed Complete	10/18/2023
Statutory Public Meeting	12/18/2023
Date Eligible for Appeal for Non-Decision	1/16/2024

Financial Impact

None arising from this report.

Respectfully submitted,

Jill Hogan
Commissioner, Development Services

For questions, please contact: Aaron Raymond, MCIP, RPP Phone: Ext. 2313
Senior Planner

Attachments

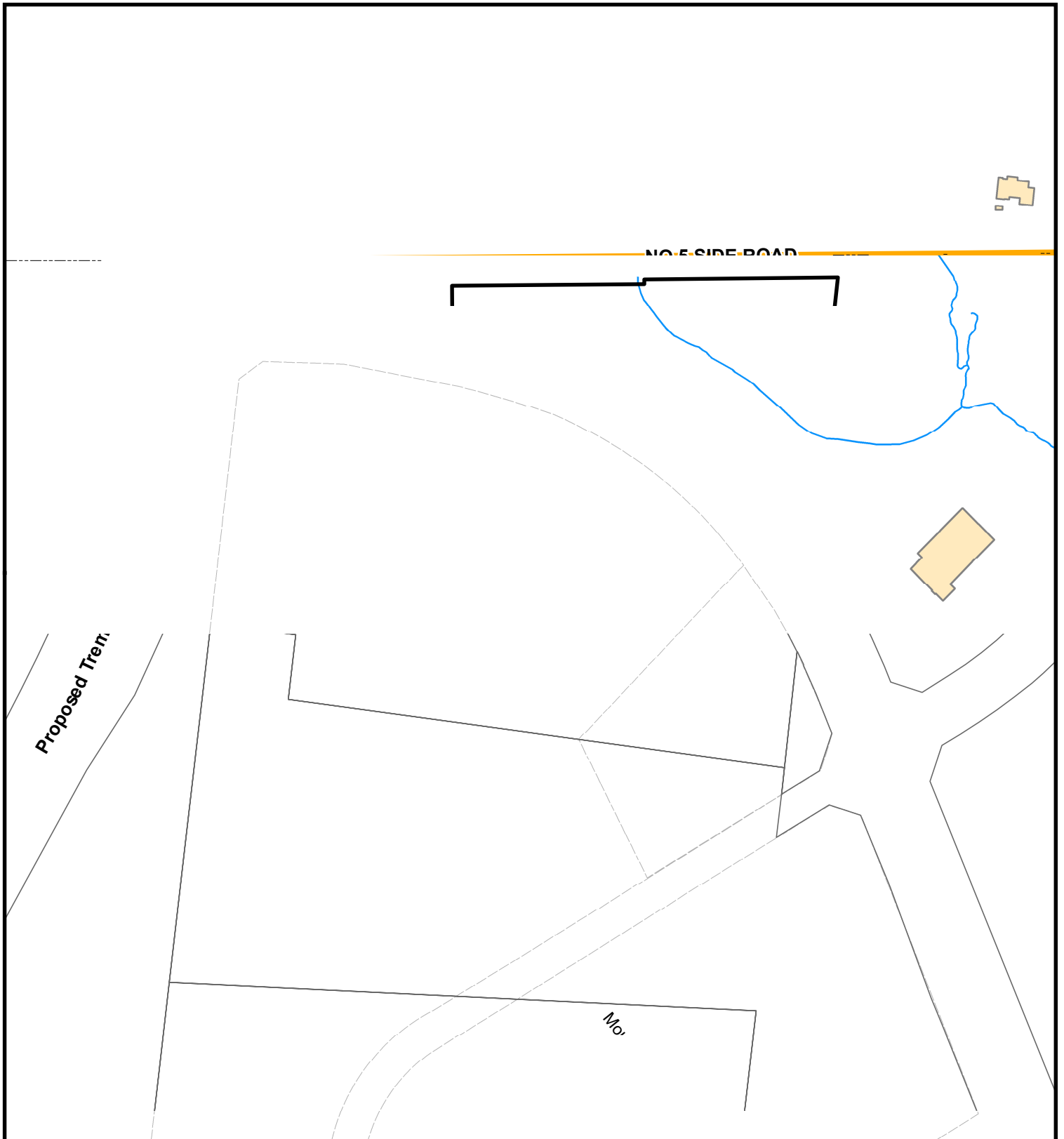
- Figure 1- Location Map
- Figure 2- Concept Plan
- Figure 3 – Concept Rendering
- Appendix 1- Draft Zoning By-law Amendment

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

FIGURE 1 LOCATION MAP



Council Meeting Date:
December 18th, 2023

Scale: 1: 3,000

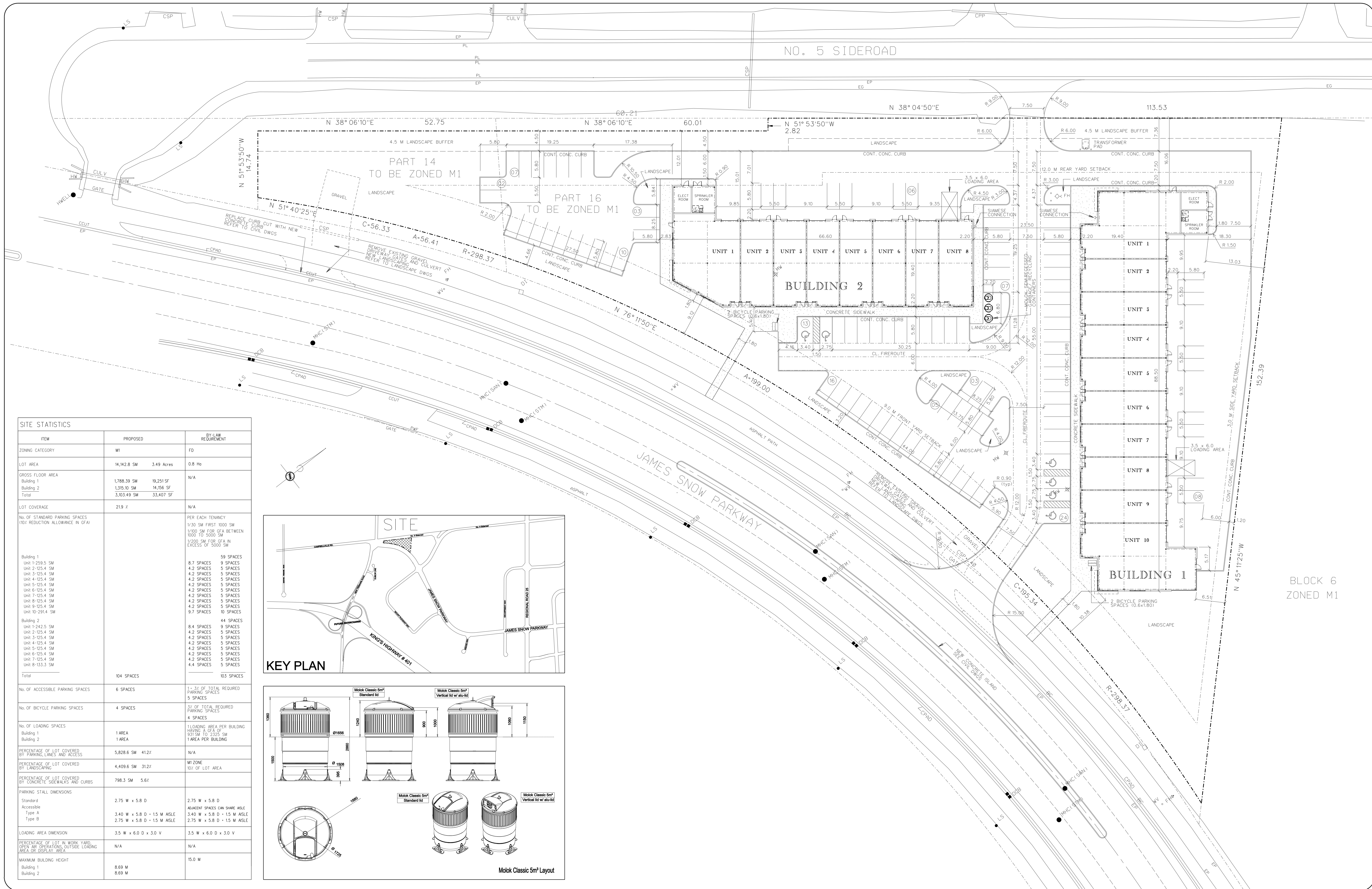
Files: Z-10/23

Development Services Department

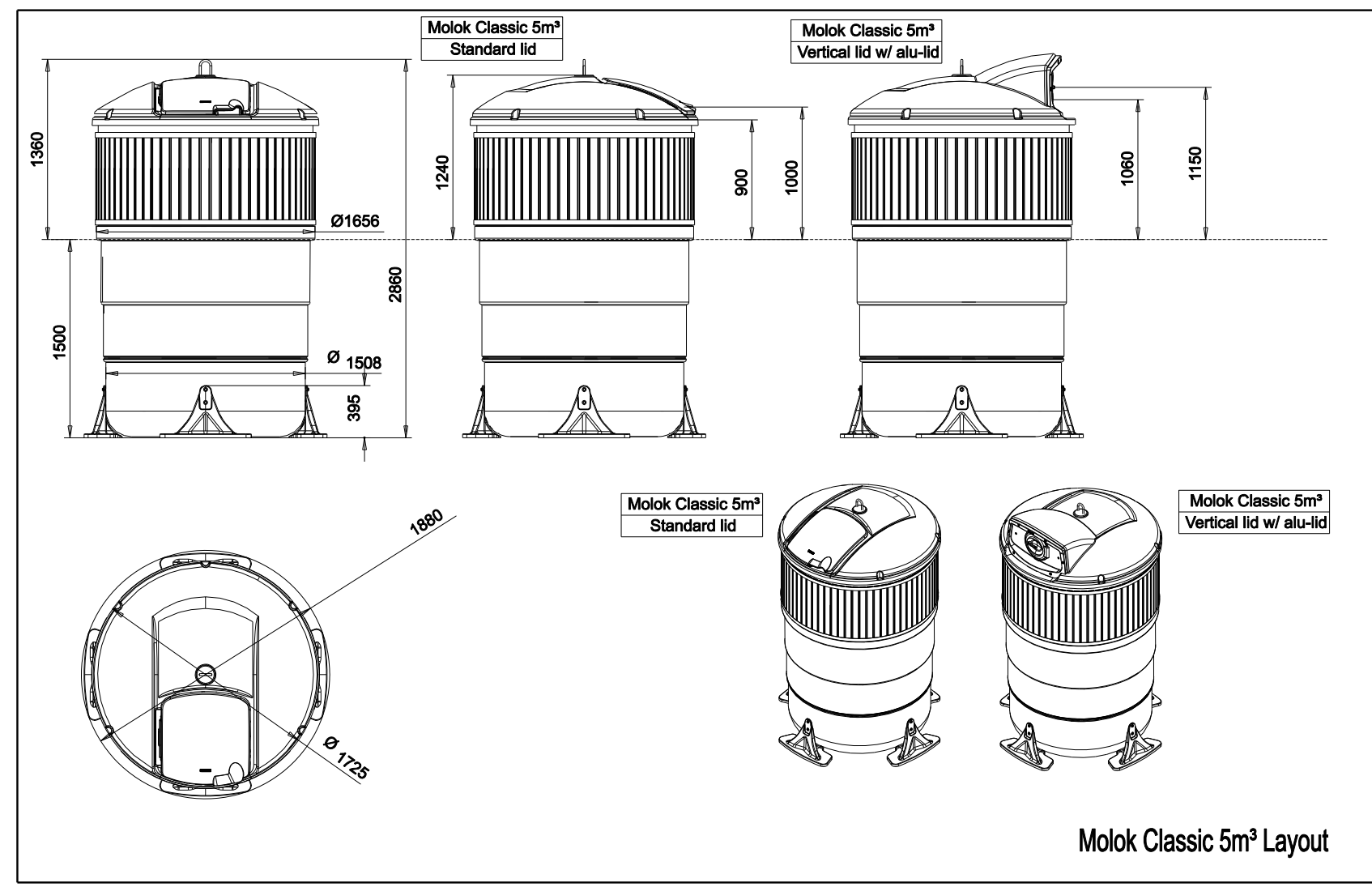
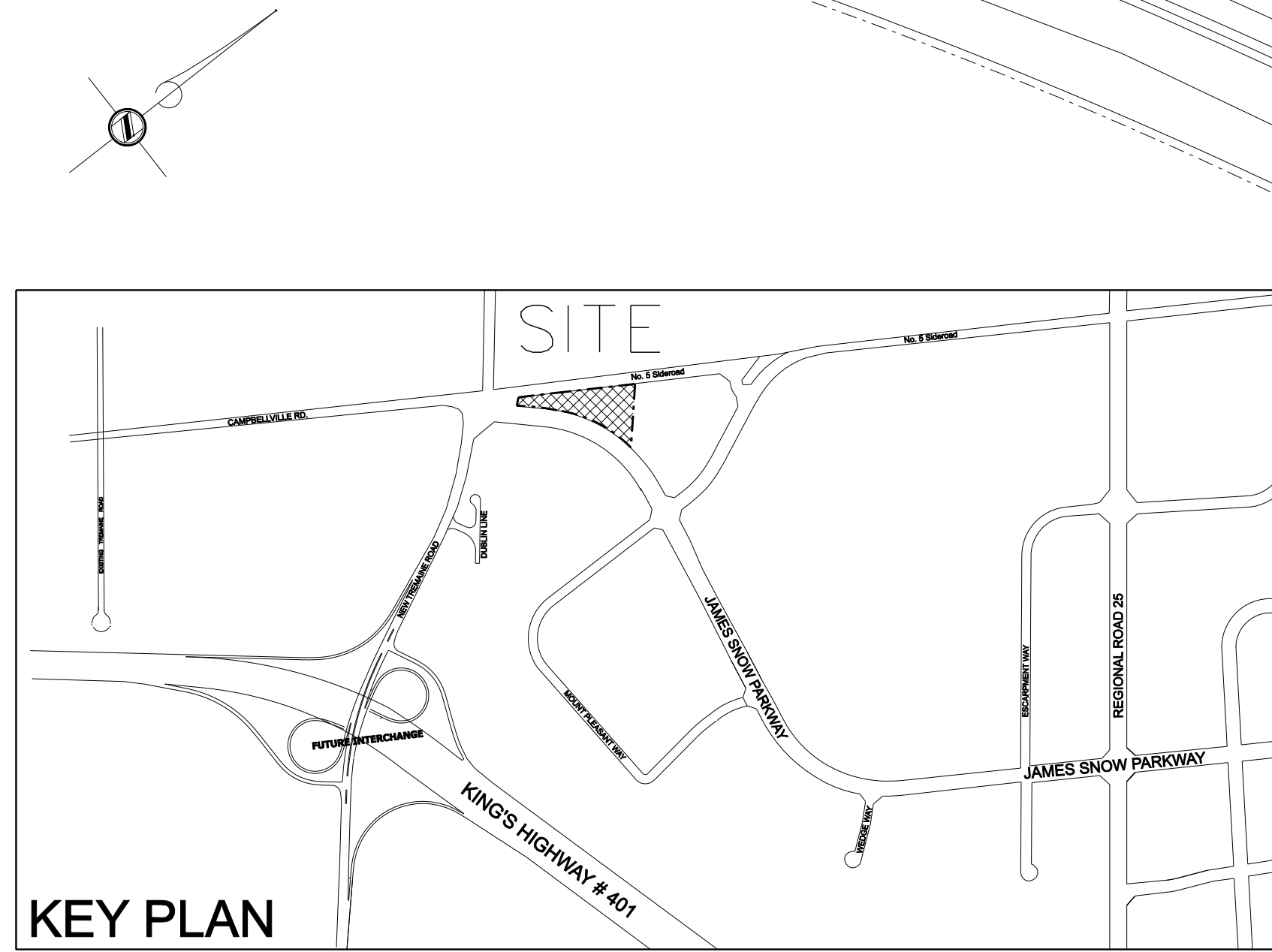


Subject Property
Page 145 of 365

Copyright 2023: Town of Milton, Teranet Inc.



SITE STATISTICS		
ITEM	PROPOSED	BY-LAW REQUIREMENT
ZONING CATEGORY	M1	FD
LOT AREA	14,342.8 SM 3.49 Acres	0.8 Ha
GROSS FLOOR AREA	Building 1: 1,788.39 SM 19,251 SF Building 2: 1,315.10 SM 14,156 SF Total: 3,103.49 SM 33,407 SF	N/A
LOT COVERAGE	219.7%	N/A
No. OF STANDARD PARKING SPACES (NOV REDUCTION ALLOWANCE IN GFAR)		PER EACH TENANCY 1/30 SM FIRST 1000 SM 1/100 SM FOR GFA BETWEEN 1000 TO 5000 SM 1/200 SM FOR GFA IN EXCESS OF 5000 SM
Building 1		8.7 SPACES 59 SPACES
Building 2		8.4 SPACES 44 SPACES
Total	104 SPACES	103 SPACES
No. OF ACCESSIBLE PARKING SPACES	6 SPACES	1 - 3% OF TOTAL REQUIRED PARKING SPACES 5 SPACES
No. OF BICYCLE PARKING SPACES	4 SPACES	3% OF TOTAL REQUIRED PARKING SPACES 4 SPACES
No. OF LOADING SPACES	Building 1: 1 AREA Building 2: 1 AREA	1 LOADING AREA PER BUILDING HAVING A GFA OF 1,000 SM TO 2,500 SM 1 AREA PER BUILDING
PERCENTAGE OF LOT COVERED BY PARKING, LANES AND ACCESS	5,828.6 SM 41.2%	N/A
PERCENTAGE OF LOT COVERED BY LANDSCAPING	4,409.6 SM 31.2%	M1 ZONE 10% OF LOT AREA
PERCENTAGE OF LOT COVERED BY CONCRETE SIDEWALKS AND CURBS	798.3 SM 5.6%	
PARKING STALL DIMENSIONS	Standard: 2.75 W x 5.8 D Accessible Type A: 3.40 W x 5.8 D + 1.5 M AISLE Type B: 2.75 W x 5.8 D + 1.5 M AISLE	2.75 W x 5.8 D ADJACENT SPACES CAN SHARE AISLE 2.75 W x 5.8 D + 1.5 M AISLE
LOADING AREA DIMENSION	3.5 W x 6.0 D x 3.0 V	3.5 W x 6.0 D x 3.0 V
PERCENTAGE OF LOT IN WORK YARD, OPEN AIR OPERATIONS, OUTSIDE LOADING AREA OR DISPLAY AREA	N/A	N/A
MAXIMUM BUILDING HEIGHT	Building 1: 8.69 M Building 2: 8.69 M	15.0 M



CONTRACTOR MUST CHECK AND VERIFY ALL DIMENSIONS AND BE RESPONSIBLE FOR SAME. REPORTING ANY DISCREPANCIES TO THE ARCHITECT BEFORE COMMENCING WORK.			
ALL DRAWINGS, PRINTS AND SPECIFICATIONS ARE THE PROPERTY OF THE ARCHITECT AND MUST BE RETURNED TO HIM ON COMPLETION OF WORK.			
LATEST APPROVED DRAWINGS ONLY TO BE USED FOR CONSTRUCTION.			
PRINTS ARE NOT TO BE SCALED.			
JUN 27 2023	PER ZONING BY-LAW	JUN 27 2023	2ND SUBMISSION FOR BY-LAW AMEND
	AMENDMENT COMMENTS	MAY 23 2023	ZONING BY-LAW AMENDMENT
No Date Plotted	Revisions	Date Plotted	Issued for:

Industrial Development
James Snow Parkway North
 James Snow Parkway Milton, Ontario
 Parts 14 and 16, RP 20R20039, Town of Milton, Regional Municipality of Halton

EMERY INVESTMENTS
 620 Wilson Avenue, Suite 401 Toronto, Ontario, M3K 1Z3
 Tel: (416) 630-6927 Fax: (416) 630-6997

Site Plan	DRAWN BY : J. DeCicco
	DATE : June 27, 2023
	SCALE : 1:300
	PROJECT NO. : 22-15
	DRAWING NO. : A-1.0

GLOBAL ARCHITECT INC.
 8 Leswyn Road Toronto, Ontario, M6A 1K2
 Tel: (416) 256-4440 Fax: (416) 256-4449

Figure 3 - Concept Rendering



THE CORPORATION OF THE TOWN OF MILTON

BY-LAW XXX-2023

BEING A BY-LAW TO AMEND THE TOWN OF MILTON COMPREHENSIVE ZONING BY-LAW 016-2014, AS AMENDED, PURSUANT TO SECTION 34 OF THE *PLANNING ACT* IN RESPECT OF THE LANDS DESCRIBED AS PART LOT 5, CONCESSION 2, FORMER GEOGRAPHIC TOWNSHIP OF ESQUESING, TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (CJJ HOLDINGS LIMITED) - FILE: Z-10/23

WHEREAS the Council of the Corporation of the Town of Milton deems it appropriate to amend Comprehensive Zoning By-law 016-2014, as amended;

AND WHEREAS the Town of Milton Official Plan provides for the lands affected by this by-law to be zoned as set forth in this by-law;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Schedule A to Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by changing the existing Future Development (FD) zone symbol to a site specific Business Park (M1*XXX) symbol on the land shown on Schedule A attached hereto.
2. **THAT** Section 13.1.1 of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding Section 13.1.1.XXX to read as follows:
 - a. For the purposes of administering the Zoning By-law, James Snow Parkway shall be deemed to be the front lot line.
3. If no appeal is filed pursuant to Section 34(19) of the *Planning Act*, R.S.O. 1990, c. P.13, as amended, or if an appeal is filed and the Ontario Land Tribunal dismisses the appeal, this by-law shall come into force on the day of its passing. If the Ontario Land Tribunal amends the by-law pursuant to Section 34 (26) of the *Planning Act*, as amended, the part or parts so amended come into force upon the day the Tribunal's Order is issued directing the amendment or amendments.

PASSED IN OPEN COUNCIL ON [DATE]

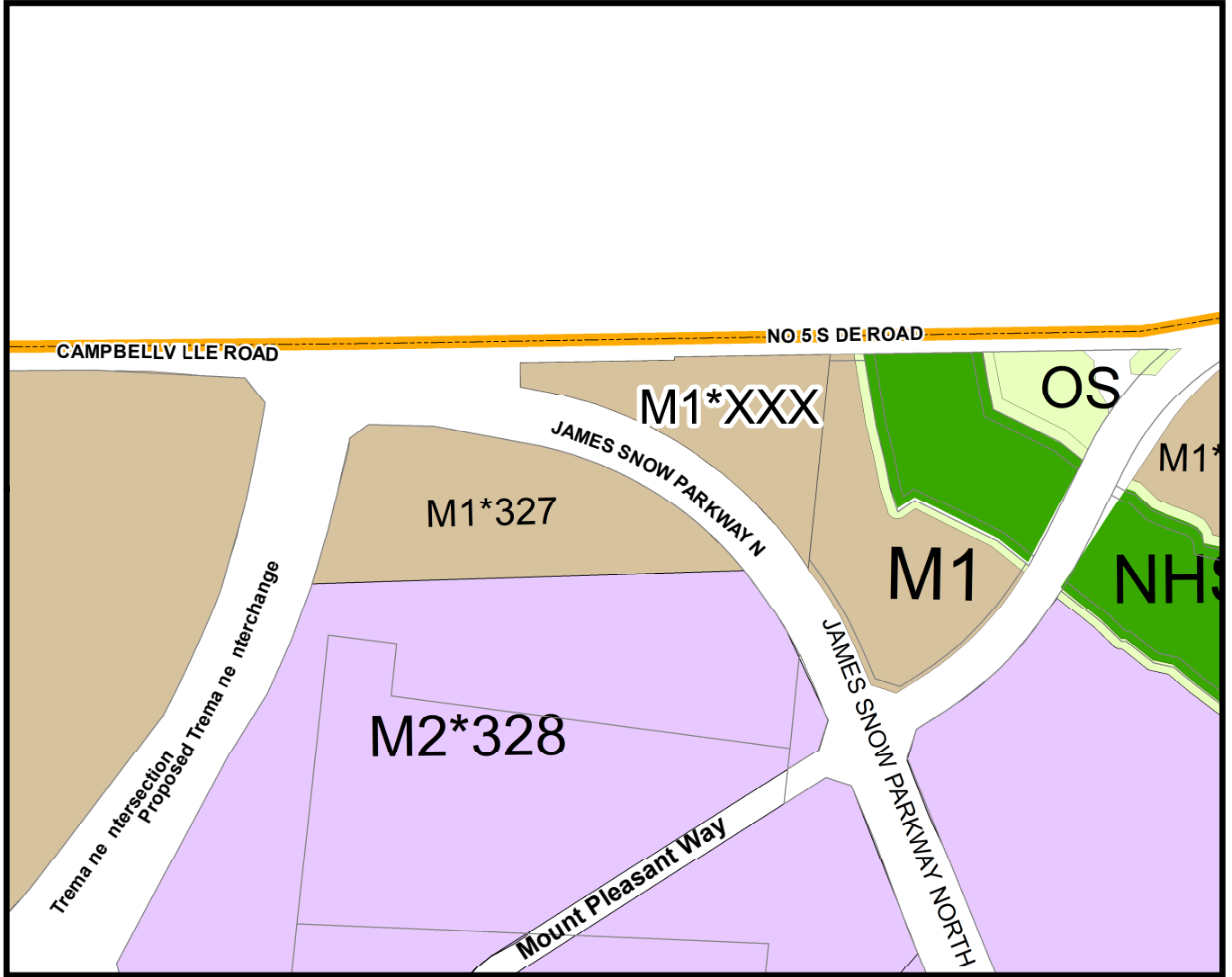
Gordon A. Krantz Mayor

Meaghen Reid Town Clerk

SCHEDULE A
TO BY-LAW No. -2023

TOWN OF MILTON

PARTS 14 AND 16,
RP 20R20039
Town of Milton



THIS IS SCHEDULE A
TO BY-LAW NO. _____ PASSED
THIS __ DAY OF _____, 2023.



M1*XXX - Business Park Zone Special

MAYOR - Gordon A. Krantz

CLERK- Meaghen Reid





The Corporation of the Town of Milton

Report To: Council

From: Kristene Scott, Commissioner, Community Services

Date: December 18, 2023

Report No: COMS-011-23

Subject: 2023 Milton Community Fund Allocations

Recommendation: THAT Milton Community Fund applications numbered 1 to 53, save and except numbers 6, 12, 24, 30 and 38 contained in Schedule C, be approved;

AND THAT the Mayor and Clerk be authorized to execute any agreements associated with the approved recommendations contained within the Staff Report COMS-011-23.

AND THAT Community Fund application number 6 contained in Schedule C be approved;

AND THAT Community Fund application number 12 contained in Schedule C be approved;

AND THAT Community Fund application number 24 contained in Schedule C be approved;

AND THAT Community Fund application number 30 contained in Schedule C be approved;

AND THAT Community Fund application number 38 contained in Schedule C be approved;

EXECUTIVE SUMMARY

- The Community Fund Advisory Committee (CFAC) is comprised of six (6) citizen volunteers and one (1) Member of Council and together they review applications and make funding recommendations to Council.
- Fifty-three (53) applications were submitted for consideration to the 2023 Milton Community Fund (MCF) program, including six (6) new applicants.
- The annual budget allotment to the MCF increased from \$250,000 in 2022 to \$500,000 in 2023 with \$75,000 being directed to the Milton Small Grant Program (MSGP).

EXECUTIVE SUMMARY

- Staff reviewed all applications to determine eligibility and the CFAC completed an allocation process that recommends forty-six (46) organizations receive funding totalling \$362,564; similar to previous years, not all funding is allocated.
- Staff in consultation with the CFAC plan to review and make minor changes to the allocation process in order to maximize the impact of the funds on the community in a given year provided there is merit in the application.
- Opportunities to educate and provide guidance to organizations about the MCF program and how/where to direct their efforts to achieve the best outcome will also be explored.

REPORT

Background

Communication about the 2023 Milton Community Fund program and the application process was circulated in May to former applicants who met the program eligibility requirements, organizations affiliated with the Town of Milton, community organizations and those who specifically contacted the Town of Milton for information about funding opportunities available from the municipality. A copy of the 2023 guidelines outlining eligibility criteria is contained in Schedules A1 and A2.

Discussion

The deadline date for this year's program was September 11. Fifty-three (53) applications and requests totaling \$980,177 were submitted. Applicant and proposal eligibility was reviewed by a corporate staff team and CFAC. In addition, the Corporate Services Department completed a financial analysis of each organization.

Review Process

Applications were circulated to members of the CFAC for their individual review prior to meeting as a committee on November 14, 16, 17. The focus of the CFAC review remains on the proposals for funds, benefit to the community, the lasting impacts of funds granted, the ability of the organization to sustain the proposal after funding is used, and a financial review of the requested dollars. In addition, consideration was given to organizations that provide recreation, artistic, and cultural programs and services.

Members of the CFAC carefully reviewed the applications and the amount of funding requested by each applicant. Some of the unsuccessful applications were based on the failure to meet the fund requirements, the project not being deemed a priority, or the limited

Discussion

impact on Milton residents. Members of the CFAC undertook a diligent review of all applicants and staff continue to be impressed with their dedication and commitment to the review process.

Similar to previous years, CFAC did not allocate all the funds available to them. Dollars not awarded in the current year are carried over and made available the following year, therefore ensuring the funds ultimately impact the community groups the fund serves.

Staff are planning to review the allocation process with the CFAC prior to the 2024 program commencing. The goal is to ensure a process exists whereby the funds available to the eligible groups and the community are maximized.

A listing of all applicants, funding requests and CFAC recommendations is contained in Schedule B for consideration. Additional information regarding each applicant and their request for funding is contained in Schedule C.

Notification

All decisions recommended by CFAC and approved by Town Council are final. Staff will notify all applicants of funding decisions following Council's approval of this report.

Leadership Workshops

The MCF guidelines allow for a portion of the funds allocated to be targeted to the development and execution of training sessions regarding topics of interest to Board/Committee members and volunteers of non-profit organizations servicing the Milton community. Funding of \$3,350 was used towards community organization leadership training in 2023 via the inaugural Non-Profit Congress hosted at the Milton Sports Centre on Saturday, November 18. There was a lot of interest resulting in 78 attendees representing 41 organizations.

Milton Small Grant Program

A portion of the 2023 MCF funding (\$75,000) was directed to the Milton Small Grant Program which is in its final year as a pilot program.

Grants of up to \$2,500 were allocated per approved activity, to encourage and enhance support for small scale citizen-led activities and events that support relationship building among community members and provide opportunities for connection, knowledge sharing, cultural exchange and community-building.



Discussion

Unused funds will be returned to the MCF for future allocation programs. A staff report will be submitted for Council review in Q1 2024 with full details, reconciliation and staff recommendations regarding the continuance of the program.

Financial Impact

The recommendations in this report total \$362,564 in allocations to community organizations plus \$3,350 for organizational leadership training. Based on the funding envelope that CFAC utilized (current year envelope plus other adjustments), unspent funding from the current year equals \$65,764. In addition, funding from prior years of \$29,912 remain, leaving a total amount of \$95,676 that will be carried over and available for the 2024 Milton Community Fund process.

Respectfully submitted,

Kristene Scott
Commissioner, Community Services

For questions, please contact: Steve Palmer, Phone: Ext. 2581
Director, Recreation & Culture,
Community Services

Attachments

Schedule A1: 2023 Milton Community Fund guidelines for established organizations
Schedule A2: 2023 Milton Community Fund guidelines for emerging organizations
Schedule B: Fund Allocations
Schedule C: Applicant Review Summary

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

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Recognition of Traditional Lands

Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

Milton Community Fund Organization Guidelines 2023



Purpose and Background

The Milton Community Fund Program is available to support not-for-profit organizations whose initiatives add to the quality of life within our community or enhance the image of the Town. The Milton Community Fund was established by Town of Milton Council to distribute a portion of the funds received from the Ontario Lottery and Gaming Corporation (Woodbine Mohawk Park) for the benefit of the community. To date, more than \$7.3 million has been distributed. The Town of Milton is grateful to the OLG for their financial contribution to our municipality.



Relationship to the Town of Milton's Strategic Plan

The purpose of the Community Fund program is in keeping with the Town's strategic plan goal of a vibrant and connected community. The program assists the Town in achieving a complete, sustainable and livable community where people live, work, learn and play.

Eligibility of Applicants

The Milton Community Fund is intended to support not-for-profit organizations and groups whose programs and services are aligned with the goals of the Town of Milton's strategic action plan. Consideration will be given to organizations that provide recreation, artistic and cultural programs and services for the benefit of the Milton community.

Organizational Requirements

Organizations applying for a grant must:

1. Have existed in the community for three (3) years or more years.
2. Operate under the authority of an active volunteer board/executive/organizing committee with at least five (5) members and a minimum of four (4) members not related by blood or marriage.
3. Have a minimum of 75% of its membership/registrants comprised of Milton residents/ratepayers **unless** evidence is provided to support the exceptions noted below*.
4. Hold an Annual General Meeting and have a board of directors or executive committee elected from the general membership through a democratic election process.
5. Have completed all program requirements associated with a previous Milton Community Fund grant.
6. Provide an operating budget for the organization's operating year in which funds received would be utilized. If this has not been established by application submission, the organization must submit either a draft or the previous year's.
7. Provide financial statements for the previous two (2) years.
8. Organizations unable to accept funding from the OLG, can contact Town staff for more details, as there are alternate funding sources available.
9. Complete and submit a Milton Community Fund Grant Application Form in accordance with deadline; applications will not be accepted or considered after this point.
10. Successful recipients become ineligible for any other Town of Milton grant funding for the same calendar year that the Milton Community Fund has been allotted.

***Exceptions to 75% Milton residency:** Recognizing that a broader population base is sometimes required for an organization to be successful, applicants may be exempted from this standard if the organization meets one of the following criteria:

- ✓ Provides an emerging or unique service
- ✓ Services a population with special needs
- ✓ Caters to a high performance/elite level of activity
- ✓ Showcases community events which draw a significant audience base

Funding Opportunities

The following activities **are** eligible for funding:

- ✓ Start-up funds for emerging groups
- ✓ Start-up funds for new programs and services
- ✓ Program and service expansion
- ✓ New projects
- ✓ Equipment for programs and skills training
- ✓ Educational or celebratory events (festivals, concerts, tournaments, championships, workshops, etc.)
- ✓ Training clinics or certification programs for coaches and trainers; activity must be considered a minimum certification requirement (maximum \$200 per person)
- ✓ Training clinics or certification programs for officials (umpires, referees, etc.); activity must be considered an entry level certification requirement by the governing body (maximum \$200 per person). Training proposals will only be accepted from organizations with 75% Milton resident/ratepayers (exceptions to this requirement are not applicable to training requests).
- ✓ Conferences (maximum \$1,000 per person)
- ✓ Facility upgrades and new construction of properties owned or leased by not-for-profit organizations serving Milton residents up to a maximum of \$30,000 (priority will be on projects located within the Town's municipal borders). For capital and/or facility upgrade requests, organizations are required to provide a financial and/or in-kind commitment to the project.
- ✓ Matching support for projects which will enhance Town property. Organizations should contact the Town of Milton before starting a "matching grant" request at 905-878-7252 ext. 2539.

Please be aware of the following requirements

- Submission of an application does not guarantee funding. Organizations are cautioned from relying on the Milton Community Fund for annual support, as funding determinations are made in context with the total number of submissions made each year and the total amount of funding available.
- Organizations may request monies for more than one of the above funding options, but must consolidate all requests within a single application.
- Grant recipients must be able to provide proof of General Liability Insurance coverage for any approved allocations or associated events, with a limit of not less than \$5 million proof of insurance, listing the Corporation of the Town of Milton, 150 Mary St., Milton., ON L9T 6Z5 as an additional insured and it must include an indication that cross liability is included under the General Liability Policy.
- Grant recipients are responsible for all arranging and applying for any and all inspections/permits/licenses/approvals related to the approved items of their application.

Ineligible

The following **activities** are **not** eligible for funding:

- × Programs/services not aligned with the Town of Milton's strategic action plan
- × Invitational or discretionary travel
- × Travel or training associated with team tryouts
- × Uniforms for sport teams
- × Beautification projects
- × Flow-through funding (where the intent is to directly redistribute funds to others for example bursaries or scholarships)
- × Facility upgrades where religious or belief system activities take place
- × Debt retirement, depreciation or deficit funding
- × Retroactive funding (activities or costs incurred before grant approval)
- × Duplication of funding received or requested from another funding organization or level of government
- × Activities that could be deemed discriminatory as defined by the Ontario Human Rights Code
- × Activities whose purpose is to promote religious doctrine or are being led by a person whose mandate includes the promotion of religious doctrine
- × Political and/or advocacy activities
- × Miscellaneous expenses

Milton Community Fund Organization Guidelines 2023



The following **applicants** will **not** be eligible for funding:

- × Individuals
- × For-profit organizations
- × Foundations that raise funds for a not-for-profit, for-profit organization or another level of government and their associated groups or agencies
- × Universities, colleges, schools and their associated/auxiliary groups or agencies
- × Organizations considered to be within the social service sector
- × Organizations whose activities could be deemed discriminatory as defined by the Ontario Human Rights Code
- × Organizations whose purpose is related to political activity
- × Organizations that are not in good financial standing with the Town of Milton

Assessment Criteria

- The benefit to the Milton community and the need for the items proposed must be clearly demonstrated.
- Organizations must demonstrate how the community is made aware of the programs and services they provide and how the community can participate.
- The relationship between an organization's annual budget and the amount of funding requested should be realistic.
- Organizations must demonstrate their ability to manage and sustain growth that may result from receiving this grant.

Review/Approval Process for Grant Applications

- Applications are reviewed for completeness and clarity by Town of Milton staff members, and then forwarded to members of the Community Fund Advisory Committee (CFAC), which is a group of volunteers comprised of seven (7) people, including one (1) Milton Town Councillor.
- CFAC members will prioritize recommendations with respect to community benefit, lasting impact of the initiative and future sustainability.
- Other community funding organizations and levels of government may be consulted during the review process.
- Recommendations from CFAC are forwarded to Milton Council for final approval.
- Funding may be allocated in any amount as deemed appropriate by CFAC. All decisions are final.

Notification of Application Status

- Applicants will be notified of their application status by January 2024.
- All grant recipients will receive written notification regarding the amount and specific uses of the funding, any funding conditions, and any applicable agreement requirements.
- Funding will be released with documentation of expected evaluation and reporting requirements.
- Grant recipients can be subject to an audit conducted by the Town of Milton.

Available Funds

The total funding available for cash grants from the 2023 Milton Community Fund program is approximately \$425,000.

Timing for Use of Funds

Successful candidates must use the grant funding within one (1) year of receiving the funds. Exceptions can be made upon request.

Application Submission Deadline

Monday, September 11, 2023, by 4:30 p.m.

Submit your application package as follows:

The Corporation of the Town of Milton (Community Services Department)

Attention: Milton Community Fund

By Mail or In-Person: Town Hall, 150 Mary Street, Milton, ON, L9T 6Z5

For more information

Contact the Milton Community Fund Administrator, **Phone:** 905-878-7252, ext. 2539

Email: miltoncommunityfund@milton.ca

Purpose and Background

The Milton Community Fund Program is available to support not-for-profit organizations whose initiatives add to the quality of life within our community or enhance the image of the Town. The Milton Community Fund was established by Town of Milton Council to distribute a portion of the funds received from the Ontario Lottery and Gaming Corporation (Woodbine Mohawk Park) for the benefit of the community.



To date, more than \$7.3 million has been distributed. The Town of Milton is grateful to the OLG for their financial contribution to our municipality.

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Eligibility of Applicants

The Milton Community Fund is intended to support not-for-profit organizations and groups whose programs and services are aligned with the goals of the Town of Milton's strategic action plan. Consideration will be given to organizations that provide recreation, artistic and cultural programs and services for the benefit of the Milton community.

Organizational Requirements

Emerging Organizations applying for a grant must:

1. Have existed in the community for less than three (3) years.
2. Operate under the authority of an active volunteer board/executive/organizing committee with at least five (5) members and a minimum of four (4) members not related by blood or marriage.
3. Have a minimum of 75% of its membership/registrants comprised of Milton residents/ratepayers **unless** evidence is provided to support the exceptions noted below*.
4. Have completed all program requirements associated with a previous Milton Community Fund grant.
5. Provide an operating budget for the organization's operating year in which funds received would be utilized. If this has not been established by application submission, the organization must submit either a draft or the previous year's.
6. Organizations unable to accept funding from the OLG, can contact Town staff for more details, as there are alternate funding sources available.
7. Complete and submit a Milton Community Fund Grant Application Form in accordance with deadline; applications will not be accepted or considered after this point.
8. Successful recipients become ineligible for any other Town of Milton grant funding for the same calendar year that the Milton Community Fund has been allotted.
9. Request funding up to a maximum of 25% of their annual operating budget.

***Exceptions to 75% Milton residency:** Recognizing that a broader population base is sometimes required for an organization to be successful, applicants may be exempted from this standard if the organization meets one of the following criteria:

- ✓ Provides an emerging or unique service
- ✓ Services a population with special needs
- ✓ Caters to a high performance/elite level of activity
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Milton Community Fund Organization Guidelines 2023

Funding Opportunities

The following activities **are** eligible for funding:

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- ✓ Conferences (maximum \$1,000 per person)
- ✓ Facility upgrades and new construction of properties owned or leased by not-for-profit organizations serving Milton residents up to a maximum of \$30,000 (priority will be on projects located within the Town's municipal borders). For capital and/or facility upgrade requests, organizations are required to provide a financial and/or in-kind commitment to the project.
- ✓ Matching support for projects which will enhance Town property. Organizations should contact the Town of Milton before starting a "matching grant" request at 905-878-7252 ext. 2539.

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For more information

Contact the Milton Community Fund Administrator, **Phone:** 905-878-7252, ext. 2539

Email: miltoncommunityfund@milton.ca

Milton Community Fund – Fund Allocations

Applicant	Funding Request (\$)	CFAC Recommendation	
		Funded (\$)	Declined (\$)
2990 Lorne Scots Milton Army Cadet Corps	10,933.00	7,403.00	3,530.00
Akwaba Cultural Exchange	29,686.00	3,850.00	25,836.00
ArtHouse for Children and Youth	4,160.00	3,520.00	640.00
Arts Milton	12,515.00	12,515.00	-
Brightside Players Incorporated	4,300.00	4,300.00	-
Canadian Federation of University Women Milton	3,543.00	1,062.00	2,481.00
Centre Canadien Pour L'unite de Famille	35,150.00	9,750.00	25,400.00
Country Heritage Agricultural Society	42,351.00	15,000.00	27,351.00
Cycling Canada	88,000.00	-	88,000.00
Dare to Be Youth Charity	10,000.00	4,400.00	5,600.00
Dribble Dreams Foundation	26,400.00	6,600.00	19,800.00
Fine Arts Society of Milton	9,431.00	3,071.00	6,360.00
Halton Environmental Network	9,275.00	-	9,275.00
Halton Gujarati Seniors Samaj	27,450.00	2,250.00	25,200.00
Halton Healthcare Services Corp.	31,510.00	31,510.00	-
Italian Cultural Centre of Milton	20,830.00	-	20,830.00
Knights of Columbus	6,274.00	4,350.00	1,924.00
Leash Free Milton	10,361.00	6,500.00	3,861.00
Milton Choristers	3,000.00	3,000.00	-
Milton Concert Band	20,525.00	9,675.00	10,850.00
Milton Curling Club	19,500.00	15,000.00	4,500.00
Milton Film Festival Committee	5,905.00	5,905.00	-
Milton Girls Softball Association	12,330.00	4,690.00	7,640.00
Milton Historical Society	31,746.00	8,000.00	23,746.00
Milton Lawn Bowling Club	20,645.00	15,000.00	5,645.00
Milton Marlin Swim Team	4,656.00	4,656.00	-
Milton Minor Baseball Association	32,609.00	9,041.00	23,568.00
Milton Minor Hockey Association	21,167.00	10,000.00	11,167.00
Milton Philharmonic Orchestra	15,480.00	9,480.00	6,000.00
Milton Pickleball Association	2,165.00	2,165.00	-
Milton Players Theatre Group	20,000.00	9,000.00	11,000.00
Milton Santa Claus Parade Committee Inc.	13,154.00	7,384.00	5,770.00
Milton Skating Club	5,785.00	4,206.00	1,579.00
Milton Special Olympics	33,475.00	-	33,475.00
Milton Speed Skating	10,168.00	5,488.00	4,680.00

Applicant	Funding Request (\$)	CFAC Recommendation	
		Funded (\$)	Declined (\$)
Milton Underwater Hockey	12,104.00	3,000.00	9,104.00
Milton Volleyball League	14,430.00	3,520.00	10,910.00
Milton Youth Soccer Club	25,623.00	5,000.00	20,623.00
Milton Youth Volleyball Club	6,426.00	5,987.00	439.00
Mosaic Foundation for Youth and Women	25,680.00	-	25,680.00
Nassagaweya Tennis Club	6,869.00	4,496.00	2,373.00
Navy League of Canada/Milton Sea Cadets - 304 Chaudiere	21,075.00	12,981.00	8,094.00
Ontario Cycling Association	26,803.00	-	26,803.00
Ontario Electric Railway Historical Association	35,974.00	5,000.00	30,974.00
Optimist Club of Milton	18,267.00	10,186.00	8,081.00
REIFO	4,027.00	-	4,027.00
Scouts Canada - Blue Springs Scout Retreat	12,984.00	12,984.00	-
St. Benedict of Nursia Knights of Columbus	12,777.00	4,300.00	8,477.00
St. John Ambulance - Oakville, Milton & Halton Hills	13,797.00	12,027.00	1,770.00
Stags Basketball Club	21,338.00	12,938.00	8,400.00
Sustainable Milton	12,207.00	6,124.00	6,083.00
Triathlon Ontario	15,317.00	3,250.00	12,067.00
United Way of Halton & Hamilton	40,000.00	22,000.00	18,000.00
Total	\$ 980,177.00	\$362,564.00	\$ 617,613.00

Milton Community Fund – Applicant Review

1. MCF23-68 2990 Lorne Scots Milton Army Cadet Corps

Organization Purpose: To develop the attributes of leadership and good citizenship, promote physical fitness of youth, and stimulate interest in our Canadian Armed Forces in youth.

2023 Request: \$10,933 to assist with All Season Tents, Camping Axes/Saws/Shovels, Water Cooler, Pull-up Bars, Canopy Tents, Laser Printer, Filing Cabinet, Classroom Projector, Donation Cans, Town of Milton Swim/Fitness passes, Sanitation Supplies, Training for Standard First Aid CPR C + AED.

Recommendation: \$7,403 to assist with 14 x All Season Tents (10 x 4-person, 4 x 6-person); 3 x Camping Axes; 3 x Camping Saws; 4 x Camping Shovels; Training for Standard First Aid CPR C + AED (4 x \$200 per Volunteer).

2. MCF23-434 Akwaba Cultural Exchange

Organization Purpose: To promote solidarity among Milton communities through culture and educational exchange, conferences, workshops, economic development, and leadership empowerment initiatives.

2023 Request: \$29,686 to assist with Black History Month (Feb 17, 2024) Rental Space; DJ and All Equipment; Promotion/Marketing; Special Event Liability; MC; Volunteer Coordinator; Food for Volunteers/Staff; Dance Group; Artistic Director; Milton African and Multicultural Festival (Aug 10, 2024) Rental Space; Mobile Stage (100 chairs + Drum Kits + Mics); DJ and All Equipment; Promotion/Marketing; Musical Bands.

Recommendation: \$3,850 to assist with Milton African and Multicultural Festival (Aug 10, 2024) Milton Community Park Rental Space; Mobile Stage (100 chairs + Drum Kits + Mics).

3. MCF23-419 ArtHouse for Children and Youth

Organization Purpose: To provide safe, accessible and innovative cost-free arts programs led by professional instructors to children 7-12.

2023 Request: \$4,160 to assist with Staff Instructor Fees; Staff Prep Time; Arts Supplies for eight (8) Programs.

Recommendation: \$3,520 to assist with Staff Instructor Fees; Arts Supplies for eight (8) Programs.

4. MCF23-58 Arts Milton

Organization Purpose: To enrich the cultural activities in Milton for the benefit of the public and the participating artists.

2023 Request: \$12,515 to assist with Staff Coordinator; Arts and Culture Experiences; Final Event for Friendship Project; Arts and Culture Bus Tour; Meeting Rental Space; Transportation for Newcomers to Events (if needed); Admin Supplies.

Recommendation: \$12,515 to assist with Staff Coordinator; Arts and Culture Experiences; Final Event for Friendship Project; Arts and Culture Bus Tour; Meeting Rental Space; Transportation for Newcomers to Events (if needed); Admin Supplies.

5. MCF23-429 Brightside Players Incorporated

Organization Purpose: To deliver fun, family-focused, interactive entertainment to the residents of Milton.

2023 Request: \$4,300 to assist with Rehearsal Rental Space; Flat Printing (Production Set Item).

Recommendation: \$4,300 to assist with Rehearsal Rental Space; Flat Printing (Production Set Item).

6. MCF23-307 Canadian Federation of University Women Milton

Organization Purpose: To pursue knowledge, promotion of education, improvement of the status of women and girls and active participation in public affairs in the spirit of cooperation and friendship.

2023 Request: \$3,543 to assist with Video Camera and Tripod; Parade Banner; Rental Space; New Tables for Annual Used Book Sale.

Recommendation: \$1,062 to assist with Parade Banner; Rental Space.

7. MCF23-451 Centre Canadien Pour L'unite de Famille

Organization Purpose: To contribute to the construction of a society where the well-being of families and their members is ensured through innovation in work approach, service excellence, and social, artistic and cultural initiatives.

2023 Request: \$35,150 to assist with AfroJazz Fest (Aug 23-23, 2024) Contractual fees and salary; Advertising, Translation, Social Media, Website Updates; Space Rental, lighting system and sound system; Security, first aid, ambulance; Logistics (Exhibitions, installation, portlets, handwash sink, tents, tables, dismantling, chairs); Transportation and accommodation for artists; Rythmes & Cultures (Feb 2024) Staff and professional fees; Travel; Insurance; Space Rental, lighting system and sound system; Translation; Marketing, awareness, publicity.

Recommendation: \$9,750 to assist with AfroJazz Fest (Aug 23-23, 2024) 50% Space Rental, lighting system and sound system; Rythmes & Cultures (Feb 2024) 50% Space Rental, lighting system and sound system.

8. MCF23-29 Country Heritage Agricultural Society

Organization Purpose: To showcase the evolution of rural life, agriculture and food development in Ontario (past, present and future) through a range of educational programs, events and communications activity.

2023 Request: \$42,351 to assist with Electronic Signage.

Recommendation: \$15,000 to assist with Electronic Signage (prioritizing interior grounds signage).

9. MCF23-456 Cycling Canada

Organization Purpose: To inspire Canadians to cycle; inclusive of all cycling disciplines, from traditional sports like road and track to more recent additions like BMX Freestyle.

2023 Request: \$88,000 to assist with Community Entrance Hall of Fame Display.

Recommendation: \$0 - Ineligible. This organization does not meet fund requirements of 75% Miltonian Residency.

10. MCF23-459 Dare to Be Youth Charity

Organization Purpose: To promote community engagement of youth through various volunteer engagement and leadership opportunities. To mentor youth. To educate and promote personal youth development and leadership skills. To help individual youth in need obtain assistance regarding health, housing, financial, legal and family and parenting issues.

2023 Request: \$10,000 to assist with Playday Festival Event (May 2024) Artists/Bands and Crew; Inflatable Racer Activity; Sponsor signs and registration materials, Prizes, student bursary; Equipment.

Recommendation: \$4,400 to assist with Playday Festival Event (May 2024) Artists/Bands and Crew.

11. MCF23-458 Dribble Dreams Foundation

Organization Purpose: To provide accessible and inclusive basketball programs for individuals of all ages and backgrounds. To create a positive and engaging environment where the youth can develop their basketball skills, build friendships, and foster a sense of community.

2023 Request: \$26,400 to assist with Gym Space Rental; Insurance; Basketballs; Basketball Shooting Machine; Marketing and Media Equipment; Coaches and Trainers; Staffing; Additional Basketball Equipment; First Aid & CPR Certification; National Coaching Certificate; Basketball Referee Certification; Strength & Conditioning Certification

Recommendation: \$6,600 to assist with Gym Space Rental.

12. MCF23-06 Fine Arts Society of Milton

Organization Purpose: To bring together people with a common interest in the visual arts and to provide the opportunity for members to further their growth in art and art appreciation.

2023 Request: \$9,431 to assist with Visual Arts Mentoring Program for Youth (Spring, 2024) Materials and Supplies; Staff Instructors Wages; Space Rental Holcim Gallery; Space Rental MCRC.

Recommendation: \$3,071 to assist with Visual Arts Mentoring Program for Youth (Spring, 2024) Materials and Supplies; Space Rental Holcim Gallery; Space Rental MCRC.

13. MCF23-257 Halton Environmental Network

Organization Purpose: To be a recognized facilitator for environmental sustainability issues and to work toward a sustainable future by making environmental connections in Halton.

2023 Request: \$9,275 to assist with Generation Green Project Showcase (May 11, 2024) Staffing; AV equipment; Projector Screen; Catering Costs; Printed Materials; Student Awards; Transportation.

Recommendation: \$0 - This application was not seen as a funding priority at this time.

14. MCF23-426 Halton Gujarati Seniors Samaj

Organization Purpose: To improve the quality of life for Gujarati seniors by providing a forum for social interactions, cultural entertainment, recreational activities as well as information sharing and support for Gujarati-speaking seniors in Halton Region.

2023 Request: \$27,450 to assist with Hall Space Rental; Trainers; Food/Nourishments; Display Decorations; Entertainers; Equipment; Group Identifiers; Banner; Appreciation Plaques; Insurance; Annual Government Filings.

Recommendation: \$2,250 to assist with Hall Space Rental.

15. MCF23-173 Halton Healthcare Services Corp.

Organization Purpose: To provide quality, compassionate health care and services to meet the diverse needs of our population in a timely and effective manner.

2023 Request: \$31,510 to assist with E-Pen Drill.

Recommendation: \$31,510 to assist with E-Pen Drill.

16. MCF23-251 Italian Cultural Centre of Milton

Organization Purpose: To promote social, athletic and recreational activities among its members and to illustrate and preserve the Italian heritage as part of the entire culture of Milton and Canada.

2023 Request: \$20,830 to assist with Tankless Gas Water Heater; Make Up Air System; Mini Split Heat Pump; Cocktail Tables; Outdoor Folding Chairs with Cart; Marketing Coordinator; Sunshade.

Recommendation: \$0 - This application was not seen as a funding priority at this time.

17. MCF23-53 Knights of Columbus

Organization Purpose: To improve the quality of life for the resident of Milton by direct involvement in community centered activities and by raising funds and distributing those funds to individuals and community groups in need.

2023 Request: \$6,274 to assist with Pop-up Canopy; Generator; Food Boxes; Speaker PA System; Aprons with Logo; Table Cloths.

Recommendation: \$4,350 to assist with Pop-up Canopy; Generator; Food Boxes.

18. MCF23-235 Leash Free Milton

Organization Purpose: To promote the establishment and maintenance of leash free areas; to promote responsible dog ownership while developing and fostering community spirit; to organize recreational and educational activities.

2023 Request: \$10,361 to assist with 10' x 10' Hard Top Gazebos; Gazebo Installation; 48" Riding Mower Loose Knit Twin Bagger; Security Camera Surveillance Annual Subscription; Solar LED Motion Sensor Lights; 50' Snow Fence.

Recommendation: \$6,500 to assist with 10' x 10' Hard Top Gazebos (\$5,000); Gazebo Installation (\$1,500).

19. MCF23-45 Milton Choristers

Organization Purpose: To form and maintain a choir to present public performances of the highest degree of proficiency; to enhance knowledge and appreciation of choral music by the general public by presenting important choral works from all segments of the choral repertoire; to encourage musical excellence in the community.

2023 Request: \$3,000 to assist with Sleigh Bells Ring Event (Dec 7, 2024) Musical Ensemble; Soloists; Rental Space (FirstOntario Arts Centre Milton); Insurance.

Recommendation: \$3,000 to assist with Sleigh Bells Ring Event (Dec 7, 2024) Musical Ensemble; Soloists; Rental Space (FirstOntario Arts Centre Milton); Insurance.

20. MCF23-219 Milton Concert Band

Organization Purpose: To provide amateur musicians with a venue to perform and the opportunity to hone their abilities in a challenging and supportive ensemble environment; and to provide the community with a program of entertaining and vibrant public concerts and performances.

2023 Request: \$20,525 to assist with Music Director Fees; Rental Space (FirstOntario Arts Centre Milton); Sheet Music; Commissioning piece of music by Ontario composer; Upgrading Social Media Presence; Rental Space for Summer Series Concerts (July, 2024).

Recommendation: \$9,675 to assist with Music Director Fees; 50% Rental Space (FirstOntario Arts Centre Milton); 50% Sheet Music; Rental Space for Summer Series Concerts (July, 2024).

21. MCF23-89 Milton Curling Club

Organization Purpose: To provide and promote the sport of curling for a wide range of ages in Milton and the surrounding community; to offer affordable, family oriented recreation and social activities; emphasize learning, development and training with sportsmanship and community involvement.

2023 Request: \$19,500 to assist with a High Efficiency Furnace and Heat Pump.

Recommendation: \$15,000 to assist with a High Efficiency Furnace and Heat Pump.

22. MCF23-344 Milton Film Festival Committee

Organization Purpose: To produce an annual film festival that will promote local film makers and enrich the cultural lives of those living in and around Milton by exhibiting local, Canadian and International films not generally available in the area.

2023 Request: \$5,905 to assist with Spring Canadian Film Series (Apr/May, 2024) - Venue Space Rental, Staffing; Film Licenses; Starry Nights Outdoor Movies (Aug, 2024) Venue Space Rental and Equipment Rental; Staffing; Film Licenses; Halloween Movie Night (Oct 25, 2024) Venue Space Rental, Staffing; Film Licenses.

Recommendation: \$5,905 to assist with Spring Canadian Film Series (Apr/May, 2024) - Venue Space Rental, Staffing; Film Licenses; Starry Nights Outdoor Movies (Aug, 2024) Venue Space Rental and Equipment Rental; Staffing; Film Licenses; Halloween Movie Night (Oct 25, 2024) Venue Space Rental, Staffing; Film Licenses.

23. MCF23-76 Milton Girls Softball Association

Organization Purpose: To provide an inexpensive program that gives girls the opportunity to learn the fundamentals of baseball and grow socially through organized team sport.

2023 Request: \$12,330 to assist with purchase of league uniforms for all players; Softball Bats; Pitching Machines x 2.

Recommendation: \$4,690 to assist with Softball Bats (\$1,000); Pitching Machines x 2.

24. MCF23-54 Milton Historical Society

Organization Purpose: To search out Milton's heritage and make it known to the community.

2023 Request: \$31,746 to assist with Waldie Blacksmith Shop Exterior/Interior Repainting-Window Replacement.

Recommendation: \$8,000 to assist with Waldie Blacksmith Shop Exterior/Interior Repainting-Window Replacement.

25. MCF23-02 Milton Lawn Bowling Club

Organization Purpose: To promote and encourage the game of bowls by providing the means and the opportunity for members and guests to participate in lawn bowling activities and social events for mutual enjoyment, friendship, and exercise.

2023 Request: \$20,645 to assist with Toro Greenmaster #1018, Greens Mower (or equivalent).

Recommendation: \$15,000 to assist with Toro Greenmaster #1018, Greens Mower (or equivalent).

26. MCF23-43 Milton Marlin Swim Team

Organization Purpose: To provide the youth of Milton with an opportunity to participate in the sport of swimming and promote a healthy lifestyle.

2023 Request: \$4,656 to assist with Omega Start Time and Flash Time Equipment.

Recommendation: \$4,656 to assist with Omega Start Time and Flash Time Equipment.

27. MCF23-80 Milton Minor Baseball Association

Organization Purpose: To foster, promote and teach amateur ball within the Milton, and to develop and encourage sportsmanship, community spirit and good fellowship among all participants.

2023 Request: \$32,609 to assist with Catchers Equipment; Jugs Pitching Machine x 2; Junior Hack Attack Pitching Machine x 2; Hollywood Base Set x 3; Hollywood Anchor Set x 6; Champs Day (Aug, 2024) Diamond Permits; Umpires; Baseballs; Medals; Food Trucks.

Recommendation: \$9,041 to assist with Catchers Equipment.

28. MCF23-60 Milton Minor Hockey Association

Organization Purpose: To foster, promote and teach amateur hockey within the Town of Milton as well as to develop and encourage sportsmanship and good fellowship among all participants for the betterment of their physical, mental and social well-being.

2023 Request: \$21,167 to assist with 28 x iPads, chargers and covers for U9-U15 house teams.

Recommendation: \$10,000 to assist with iPads, chargers and covers for U9-U15 house teams.

29. MCF23-401 Milton Philharmonic Orchestra

Organization Purpose: To advance the public's appreciation of classical performing arts by providing high-quality musical performances in Milton and its surrounding areas.

2023 Request: \$15,480 to assist with Weekly Rehearsal Space Rental; Mattamy Theatre Space Rental; Technical/Front of House Staff Hours; Box Office Service Fees (FirstOntario Arts Centre Milton).

Recommendation: \$9,480 to assist with Weekly Rehearsal Space Rental; Mattamy Theatre Space Rental; Technical/Front of House Staff Hours (FirstOntario Arts Centre Milton).

30. MCF23-428 Milton Pickleball Association

Organization Purpose: To promote the sport of pickleball within Milton to grow interest in the sport amongst the younger demographics.

2023 Request: \$2,165 to assist with Court Cleaner Brooms; Squeegees; Replacement Nets; Paddle Holders; Paddle Holders; Jetfan Blower.

Recommendation: \$2,165 to assist with Court Cleaner Brooms; Squeegees; Replacement Nets; Paddle Holders; Paddle Holders; Jetfan Blower.

31. MCF23-66 Milton Players Theatre Group

Organization Purpose: To bring Community Theatre to the population of Milton and surrounding area and to provide an outlet for creative endeavors for our members.

2023 Request: \$20,000 to assist with Production Costs; Rehearsal Space Rental; Insurance; Equipment Storage; Royalty and Licensing Fees.

Recommendation: \$9,000 to assist with Production Costs.

32. MCF23-231 Milton Santa Claus Parade Committee Inc.

Organization Purpose: To produce and operate a successful Santa Claus Parade for the Milton Community. To operate in conjunction, and assist where possible, with other community related functions or organization with similar interests and objectives.

2023 Request: \$13,154 to assist with 75 Vests for the Safety Marshalls; Toques; Projector; Speaker System for the Santa Float; Float Maintenance and Safety Upgrade; Storage Rental Fee for 2024.

Recommendation: \$7,384 to assist with 75 Vests for the Safety Marshalls; Float Maintenance and Safety Upgrade.

33. 2337 Milton Skating Club

Organization Purpose: To provide a high quality skating programming to individuals and groups of all ages.

2023 Request: \$5,785 to assist with Pro-Motion Hand Held Jumping Harness System; Funding towards 6 iPads for Technology Update.

Recommendation: \$5,785 to assist with Pro-Motion Hand Held Jumping Harness System; Funding towards 6 iPads for Technology Update.

34. MCF23-446 Milton Special Olympics

Organization Purpose: To enrich the lives of individuals with intellectual disabilities through the power of sport, promoting respect; acceptance, inclusion, and human dignity for everyone.

2023 Request: \$33,475 to assist with Calgary Winter Games (Feb/Mar, 2024) Floor Hockey Team Participation; Tournament (Feb/Mar, 2024) - Participation Fees for Remaining Seven (7) Sports.

Recommendation: \$0 - Ineligible. This application request does not meet fund requirements.

35. MCF23-254 Milton Speed Skating

Organization Purpose: To provide all residents in Milton access to the sport of speed skating and enable our members to develop physical fitness through training and competition and to gain life experiences in a fun group setting.

2023 Request: \$10,168 to assist with Kettlebells; Laptop and Accessories; Speed/Skipping Ropes; Training Belts; Speed Skating Coach Clipboards; Video Module Accessory for E-Timer; Wireless HDMI Unit; West Zone Provincial Meet (Jan 14, 2024) Ice Rental; Banquet Room Space Rental; Food for Volunteers; Team Relay Challenge (Apr 6, 2024) Ice Space Rental; Banquet Room Space Rental; Food for Event Volunteers.

Recommendation: \$5,488 to assist with Kettlebells; Laptop and Accessories; Speed/Skipping Ropes; Training Belts; Speed Skating Coach Clipboards; Video Module Accessory for E-Timer; Wireless HDMI Unit; Team Relay Challenge (Apr 6, 2024) Ice Space Rental.

36. MCF23-450 Milton Underwater Hockey

Organization Purpose: To provide an opportunity for south-central Ontario's Team Canada players and hopefuls to have an opportunity to practice with each other and help grow and develop the emerging sport of Underwater Hockey, as well as building a stronger player base in the Milton community.

2023 Request: \$12,104 to assist with Pool Rental Fees; Equipment Fees; Milton UWH Brouhaha (May 25, 2024) Pool Space Rental fees.

Recommendation: \$3,000 to assist with Pool Rental Fees.

37. MCF23-461 Milton Volleyball League

Organization Purpose: To establish and operate a volleyball league for the purposes of promoting the game of volleyball; arranging games, matches and competitions; providing facilities and developing skills for volleyball.

2023 Request: \$14,430 to assist with Court/Facility Space Rental (Fall/Winter); Equipment (volleyballs - Mikasa x 8, Molten x 8, ball cart); Tournament and League Prizes (Fall/Winter); MVL Gear; Winter Break Tournament (Jan 6, 2024) Court Space Rental; Prizes.

Recommendation: \$3,520 to assist with Court/Facility Space Rental (Fall).

38. MCF23-41 Milton Youth Soccer Club

Organization Purpose: To provide young soccer players in Milton with the opportunity to grow and develop their soccer skills within a safe, enjoyable environment.

2023 Request: \$25,623 to assist with Containers used for equipment; USA Cup Qualifier (Aug 31-Sep 2, 2024) Field Costs, Referees Fees, Transport for Equipment, Athletic Therapists, Food.

Recommendation: \$5,000 to assist with hosting the USA Cup Qualifier (Aug 31-Sep 2, 2024) Field Costs, Referees Fees, Transport for Equipment, Athletic Therapists, Food.

39. MCF23-397 Milton Youth Volleyball Club

Organization Purpose: To provide Milton youth athletes with the opportunity to improve their volleyball skills and compete with the best athletes in Ontario and Canada.

2023 Request: \$6,426 to assist with Balls Mikasa V200W (50); Portable Speaker.

Recommendation: \$5,987 to assist with to assist with Balls Mikasa V200W (50).

40. MCF23-460 Mosaic Foundation for Youth and Women

Organization Purpose: The purpose is to find and create new opportunities for youth and women to integrate into the Canadian culture for better strong and united communities, and to offer access to the programs and services that prepare youth and women to become New Canadians.

2023 Request: \$25,680 to assist with Mosaic Artistry Program Instructors Fees; Materials; Space Rental; Marketing; Project Leads; Insurance; Administration; Mosaic Artistry Performance (Year End).

Recommendation: \$0 - Ineligible. This organization does not meet fund requirements as it is considered a social service agency.

41. MCF23-140 Nassagaweya Tennis Club

Organization Purpose: To promote the sport of tennis in the rural Milton area, to promote the development of junior tennis (participants under the age of 18), to develop an outlet for athletic and social events and to contribute to the development of the community.

2023 Request: \$6,869 to assist with Indoor Chairs; Outdoor Furniture (2 tables with benches, 2 umbrellas with stands).

Recommendation: \$4,496 to assist with Outdoor Furniture (2 tables with benches, 2 umbrellas with stands).

42. MCF23-36 Navy League of Canada / Milton Sea Cadets – 304 Chaudiere

Organization Purpose: To serve youth from ages 12 to 19, and help develop leadership, citizenship and physical fitness.

2023 Request: \$21,075 to assist with Uniform and Apparel for Cadets; Uniform and Apparel for Officers; Education Materials; Recreational Equipment; Stationery Supplies; Training Equipment.

Recommendation: \$12,981 to assist with Uniform and Apparel for Cadets.

43. MCF23-457 Ontario Cycling Association

Organization Purpose: To encourage and promote competitive cycling and organized cycling events in Ontario. To help ensure an accessible, safe and fair environment for competitive cyclists and organized cycling events. To encourage youth and adults to participate in cycling as a sport. To establish and regulate bicycle championships amongst its members in Ontario. To facilitate development of athletes from the novice to national level.

2023 Request: \$26,803 to assist with Ontario Provincial Track Cycling Championships (Mar, 2024) Facility Rental Space; Officials; Medical; Timing/Results; Podium Prizing.

Recommendation: \$0 - This application was not seen as a funding priority at this time.

44. MCF23-79 Ontario Electric Railway Historical Association

Organization Purpose: To preserve, restore and operate vintage railway equipment that would otherwise have been destroyed.

2023 Request: \$35,974 to assist with upgrade of current website.

Recommendation: \$5,000 to assist with upgrade of current website.

45. MCF23-101 Optimist Club of Milton

Organization Purpose: To develop Optimism as a philosophy of life utilizing the tenets of the Optimist Creed; to promote an active interest in good government and civic affairs; to inspire respect for law; to promote patriotism and work for international accord and friendship among all people; to aid and encourage the development of youth in the belief that the giving of one self in service to others will advance the well-being of humankind, community life and the world.

2023 Request: \$18,267 to assist with 7' x 14' Enclosed Cargo Trailer; 10' x 10' Canopy Tents with Logo; TrainCan Basic Food Safety Training; SmartServ.

Recommendation: \$10,186 to assist with 7' x 14' Enclosed Cargo Trailer (\$9,000); TrainCan Basic Food Safety Training; SmartServ.

46. MCF23-454 REIFO

Organization Purpose: Sports component (organization of sports tournaments, coaching of children in the Football discipline, Basketball - Financing of sports equipment, promotion of the practice of sports activities among families). Immigrant integration component (housing search, connection with different activities of the city, offers used clothes, training in writing CVs, school guidance). Promotion of the Francophonie (reading to children in French, organization of game tournaments français). School support and help with the school integration of new immigrants (help with homework, support for new immigrants in understanding the Canadian school system). Social component (support for Francophone families in difficulty, support for families in special events - Christmas, New Year's Eve, Easter, Halloween).

2023 Request: \$4,027 to assist with Gym Space Rental.

Recommendation: \$0 - Ineligible. This organization does not meet fund requirements as it is considered a social service agency.

47. MCF23-423 Scouts Canada - Blue Springs Scout Retreat

Organization Purpose: To offer programming for children and youth aged 5-26 through a variety of fun experiences, outdoor adventures and contributions to their community; to build resilience and skills that set them up for life.

2023 Request: \$12,984 to assist with bunk additions (Bunkie Life Inc.)

Recommendation: \$12,984 to assist with bunk additions (Bunkie Life Inc.)

48. MCF23-441 St. Benedict of Nursia Knights of Columbus

Organization Purpose: To undertake charitable activities benefiting the youth, those in material need, veterans, and the elderly.

2023 Request: \$12,777 to assist with Purchase of Covered Trailer to transport organization's BBQ equipment; Used Shipping Containers for Storage of organization's BBQ equipment.

Recommendation: \$4,300 to assist with Purchase of Covered Trailer to transport organization's BBQ equipment.

49. MCF23-248 St. John Ambulance - Oakville, Milton & Halton Hills

Organization Purpose: To support our communities through medical assistance, education, promotion of health and safety and providing comfort for the sick and lonely.

2023 Request: \$13,797 to assist with MFR Medical Shirts; MFR TAC Pants; First Aid Kits and Medical Supplies; Volunteer Recruitment Costs; Ambulance Equipment; Medical First Responder Certification (12 volunteers).

Recommendation: \$12,027 to assist with MFR Medical Shirts; MFR TAC Pants; First Aid Kits and Medical Supplies; Volunteer Recruitment Costs; Ambulance Equipment; Medical First Responder Certification (12 volunteers; \$2,400).

50. MCF23-261 Stags Basketball Club

Organization Purpose: To promote the physical development of youth in the community of Milton through participation in recreational and competitive basketball programs.

2023 Request: \$21,338 to assist with 100 x New Wilson Evolution Basketballs; National Coaching Certification Program - Learn To Train and Learn To Compete (30 volunteers); Travel costs associated with training.

Recommendation: \$12,938 to assist with 100 x New Wilson Evolution Basketballs; National Coaching Certification Program - Learn To Train and Learn To Compete (\$3,000).

51. MCF23-440 Sustainable Milton

Organization Purpose: To promote healthy, sustainable, and environmentally sound practices in Milton through education, research and direct action. To improve standards for both residents and businesses to create a thriving, healthy, sustainable economy in the face of a changing global climate.

2023 Request: \$12,207 to assist with \$5 Million liability Insurance; Signage/Markers for Newly Installed Bat Houses; Sustainability Lecture Series - Room Space Rentals, Speaker Fees, Equipment; Outdoor Community Event Equipment - Safety Vests, Grabbers, Gloves; The Future Home Event (Apr 6, 2024) - Advertising; Attendee Favours.

Recommendation: \$6,124 to assist with \$5 Million liability Insurance; Signage/Markers for Newly Installed Bat Houses (\$1,950); Sustainability Lecture Series - Room Space Rentals, Speaker Fees, Equipment (\$1,644); Outdoor Community Event Equipment - Safety Vests, Grabbers, Gloves.

52. MCF23-425 Triathlon Ontario

Organization Purpose: To provide leadership and governance to develop a safe and fair environment for multisport in Ontario.

2023 Request: \$15,317 to assist with KITCan Milton Event (Aug 3, 2024) - Event Photography; Medical Staff; Event Electronic Timing; Event Barricades; Equipment Truck Rental; Facility Space Rental; Inflatable Rental; Face Painter; Aquathon Provincial Championships/World Qualifier (Aug 21, 2024) - Medical Support Staff; Event Electronic Timing; Facility Space Rental; Equipment Truck Rental; Sound System Rental.

Recommendation: \$15,317 to assist with KITCan Milton Event (Aug 3, 2024) - Medical Staff; Event Barricades; Facility Space Rental.

53. MCF23-198 United Way of Halton & Hamilton

Organization Purpose: To ensure an essential network of programs and services work together to achieve lasting, positive change.

2023 Request: \$40,000 to assist with programming in the Milton community.

Recommendation: \$22,000 to assist with programming in the Milton community.



The Corporation of the Town of Milton

Report To: Council

From: Jill Hogan, Commissioner, Development Services

Date: December 18, 2023

Report No: DS-059-23

Subject: Technical Report: Zoning By-law Amendment Application by 150 Steeles Milton Inc. applicable to lands legally described as Part of Lot 15, Concession 2, former Geographic Township of Trafalgar and municipally known as 150 Steeles Avenue East. (Town File: Z-06/23)

Recommendation: **THAT Report DS-059-23 outlining an amendment to the Town of Milton Zoning By-law 016-2014, as amended, to implement the refined limits of the Natural Heritage System BE APPROVED;**

AND THAT staff be authorized to bring forward an amending Zoning By-law in accordance with Appendix 1 to Report DS-059-23 for Council adoption;

AND THAT the Commissioner of Development Services forward this report to the Provincial Ministers of Health, Education, Transportation and Infrastructure and Metrolinx with a request to review and plan for future Milton District Hospital, school and transportation expansions;

AND FURTHER THAT the Commissioner of Development Services forward a copy of this report and Decision to the Region of Halton for their information.

EXECUTIVE SUMMARY

150 Steeles Milton Inc. has applied for a zoning by-law amendment to the Town of Milton Zoning By-law 016-2014, as amended, for the lands located at 150 Steeles Avenue East. The purpose of the zoning by-law amendment is to rezone a portion of the subject lands from site-specific Business Park (M1*38) zone to the Natural Heritage System (NHS) zone to implement the true limits of the NHS on the subject lands. The NHS zone will be expanded to include an area of approximately 2.15 hectares on the subject lands. No development is proposed as part of the application.

EXECUTIVE SUMMARY

The statutory public meeting was held on November 13, 2023. No members of the public spoke at the statutory public meeting and staff have not received any written concerns or objections to the proposed zoning by-law amendment.

All internal Town of Milton departments and responding external agencies have provided correspondence to Town planning staff indicating their support for the application as currently presented. Planning staff have reviewed all of the documentation, plans and comments provided to date and is of the opinion that the application as submitted has been prepared in a manner that would allow it to be considered by Town Council for approval.

Conclusions and Recommendations

Planning staff is satisfied that the proposed zoning by-law amendment, as attached in Appendix 1 to this report, is consistent with the land use policies of the Provincial Policy Statement and conforms to the Regional and Town Official Plans.

Therefore, staff recommends approval of the zoning by-law amendment as presented through this report.

REPORT

Background

Owner: 150 Steeles Milton Inc., 775 Main Street East, Suite 1b, Milton, ON.

Applicant: Korsiak Urban Planning, 277 Lakeshore Road East, Unit 206, Oakville, ON.

Location/Description: The subject lands are located in Ward 1, on the south side of Steeles Avenue East, west of the intersection of Steeles Avenue East and Martin Street and are municipally known as 150 Steeles Avenue East. The subject lands are irregular in shape and have frontage on the east side of Bronte Street (8 metres), south side of Steeles Avenue East (249 metres) and west side of Martin Street (15 metres). The subject lands comprise a total area of approximately 20.3 hectares, however the proposed zoning by-law amendment only applies to a portion of the subject lands comprising an area of approximately 2.15 hectares. The subject lands are currently vacant.

The subject lands were formerly occupied by Meritor Suspension Systems Company ('MSSC') that manufactured car parts. MSSC occupied the site from 1954 to 2009. Areas of the site became contaminated as a result of the former industrial use. Contaminants were located primarily around the factory building, which has been demolished, as well as within the limits of the Regional NHS.

Background

The applicant has been working closely with staff from the Town of Milton, Halton Region and Conservation Halton during the ongoing remediation on the subject lands. It is anticipated that remediation of the subject lands will be complete by mid-2024. In order to facilitate remediation on the portion of the subject lands that is within the Regional NHS, the Town, Region and Conservation Halton required the completion of a comprehensive study to address the potential impacts related to remediation on the site and to determine the true limits of the Regional NHS.

The subject lands are surrounded by a range of land uses. Employment uses are located to the north and west of the subject lands and residential uses are located to the east of the subject lands, fronting Martin Street. The Sixteen Mile Creek, valley and surrounding NHS are located to the south and southwest of the subject lands.

Proposal:

The applicant has applied for a zoning by-law amendment to rezone a portion of the subject lands in order to reflect the true limits of the Regional Natural Heritage System. The application proposes to add approximately 2.15 hectares of land into the Natural Heritage System (NHS) zone in the Town's Urban Zoning By-law 016-2014, as amended. No development is proposed as part of the application.

The following reports have been submitted in support of this application:

- Planning Justification Brief;
- Draft Zoning By-law Amendment;
- Topographic Survey;
- Comprehensive Environmental Management Study (CEMS);
- Archaeological Clearance Letter;
- Preliminary Hydrogeological Investigation;
- Phase 1 and 2 Environmental Site Assessments; and,
- Slope Stability Assessment.

Planning Policy:

The subject lands are designated Urban Area and Regional Natural Heritage System (NHS) in the Halton Region Official Plan. Given that remediation is required within the Regional NHS, the Town of Milton, Halton Region and Conservation Halton requested a

Background

comprehensive assessment to review the potential impacts of remediating the contaminated areas within the Regional NHS on the subject lands.

In response to the above request, the applicant submitted a Comprehensive Environmental Management Study (CEMS) to demonstrate how the natural heritage features and natural hazards associated on the subject lands may be affected and managed during remediation works. While the primary purpose of the CEMS is to address potential impacts related to remediation works, the CEMS also identifies and proposes refinements to limits of the Regional NHS. It is noted that the refined limits also include a 15-metre buffer to Key Features within the Regional NHS as well.

On October 26, 2023, Town of Milton issued a letter to the applicant indicating that all agencies were satisfied with that the CEMS addressed all comments and that the study was considered complete. The proposed zoning by-law amendment schedule identifies the refined limits of the Regional NHS as identified in the CEMS.

The Halton Region Official Plan also requires the applicant of a development proposal on contaminated lands to undertake the necessary steps to bring the lands to a condition suitable for redevelopment, in accordance with Halton Region's Protocol for Reviewing Development Applications with Respect to Contaminated or Potentially Contaminated Sites. While no development is contemplated as part of the proposed zoning by-law amendment, the applicant has been undertaking remediation works on the subject lands in advance of submitting future development applications to redevelop the lands.

Prior to site alteration to establish any future land uses, the applicant will be required to file a Record of Site Condition (RSC) to the Ministry of the Environment, Conservation and Parks (MECP) that indicates that the site is suitable for the proposed land uses. Halton Region requires the applicant to submit all environmental documentation used for the filing of the RSC. Given that there is no development being proposed at this time, the Regional staff are satisfied that the proposed zoning by-law amendment can advance prior to the filing of the RSC, however the applicant will be required to file the RSC prior to future site alteration associated with redevelopment of the subject lands.

Regional staff have indicated that the proposed zoning by-law amendment conforms to the Regional Official Plan and the applicable Provincial policies.

The subject lands are designated Business Park Area and Natural Heritage System Area on Schedule B - Urban Area Land Use Plan in the Town of Milton Official Plan. The subject lands are also located within the Milton 401 Industrial/Business Park Secondary Plan and

Background

are designated Business Park Area and Natural Heritage System on Schedule C.2.B - Milton 401 Industrial/Business Park Secondary Plan Land Use Plan.

The Business Park Area designation is an employment designation that permits a full range of light industrial and office uses. While the majority of the subject lands are currently within the Business Park Area designation in the Town's Official Plan, the southern portion of the subject lands contains natural heritage features and would not be suitable for employment uses. The Town's Official Plan includes policies that enable adjustments to the limits of the NHS without an amendment to the Official Plan. However, it is noted that future Official Plan Amendment application will be required to redevelop the subject lands and the refined limits of the NHS will be implemented at that time.

The purpose of the Natural Heritage System Area designation is to protect areas which have been identified as having environmental significance. Permitted uses are limited and development is generally not permitted.

The Town's Official Plan requires all lands within the Regional NHS to be zoned appropriately in the Town's Zoning By-law. The proposed zoning by-law amendment intends to implement the refined limits of the NHS as determined through the CEMS.

Staff reviewed the application in relation to the policies of the Provincial Policy Statement (2020), the Growth Plan (2019), the Halton Region Official Plan and the Town of Milton Official Plan. Town staff and our agency partners are satisfied that the application for the zoning by-law amendment as presented through this report, conforms to the applicable Provincial, Regional and Town land use planning policies and regulations.

Zoning By-law 016-2014, as amended

The subject lands are currently zoned Business Park with a special exception (M1*38) and Natural Heritage System (NHS) under the Town of Milton Urban Zoning By-law 016-2014, as amended.

The proposed zoning by-law rezones a portion of the subject lands to the NHS zone to implement the refined limits of the Regional NHS as determined through the CEMS. There are limited permitted uses in the NHS zone and these include existing uses, conservation uses and forestry uses. New development is not permitted within the NHS zone. Appendix 1 to this Report includes the proposed zoning by-law.

Discussion

Public Consultation and Review Process

Notice of the statutory public meeting was provided pursuant to the requirements of the Planning Act on October 16, 2023 and the statutory public meeting was held on November 13, 2023. No members of the public spoke at the statutory public meeting. At the time of writing this report, Planning staff have not received any written letters of concern or objections to the proposed zoning by-law amendment.

Agency Consultation

The proposed zoning by-law amendment and all supportive documents were circulated to both internal and external commenting agencies. Halton Region, Conservation Halton, Town departments and other agencies offered no objection to the proposed zoning by-law amendment.

Comprehensive Environmental Management Study and Continued Remediation

The Town, Region and Conservation Halton requested that the applicant prepare the Comprehensive Environmental Management Study (CEMS) to support the continued remediation on the portion of the subject lands that is within the Regional natural heritage system. On October 26, 2023, the Town of Milton issued a letter to the applicant indicating that all agencies were satisfied that the CEMS addressed their comments and that the study is considered complete.

The primary purpose of the CEMS is to demonstrate how natural heritage features and hazards may be affected during remediation works and includes environmental management strategies to mitigate potential adverse effects. The CEMS also describes restoration measures that will be implemented following the completion of remediation works, which will ultimately lead to enhancing the Regional NHS on the subject lands. The CEMS will be relied upon as the applicant continues to remediate and restore the Regional NHS on the subject lands.

In addition to the above, the CEMS proposes refinements to the limits of the Regional NHS that reflected in the zoning by-law amendment. The new refined limit includes a 15-metre buffer to Key Features within the Regional NHS as well. Staff is of the opinion that the proposed zoning by-law amendment implements the refined limits of the Regional NHS in the Town's Urban Zoning By-law 016-2014, as amended, in accordance with the requirements of the Town's Official Plan.



Discussion

Conclusion

Staff is satisfied that the site-specific zoning by-law, as attached as Appendix 1 to this report, will implement the Official Plan requirements to appropriately zone lands within the Natural Heritage System. Planning staff is also satisfied that the proposed zoning by-law amendment is consistent with Provincial Policy and conforms to the Region of Halton and Town of Milton Official Plans. Therefore, staff recommends approval of the draft zoning by-law amendment.

Financial Impact

None arising from this Report.

Respectfully submitted,

Jill Hogan
Commissioner, Development Services

For questions, please contact: Jessica Tijanic, MSc., MCIP, RPP Phone: Ext. 2221
Senior Planner

Attachments

Figure 1 - Location Map
Appendix 1 - Zoning By-law Amendment

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.



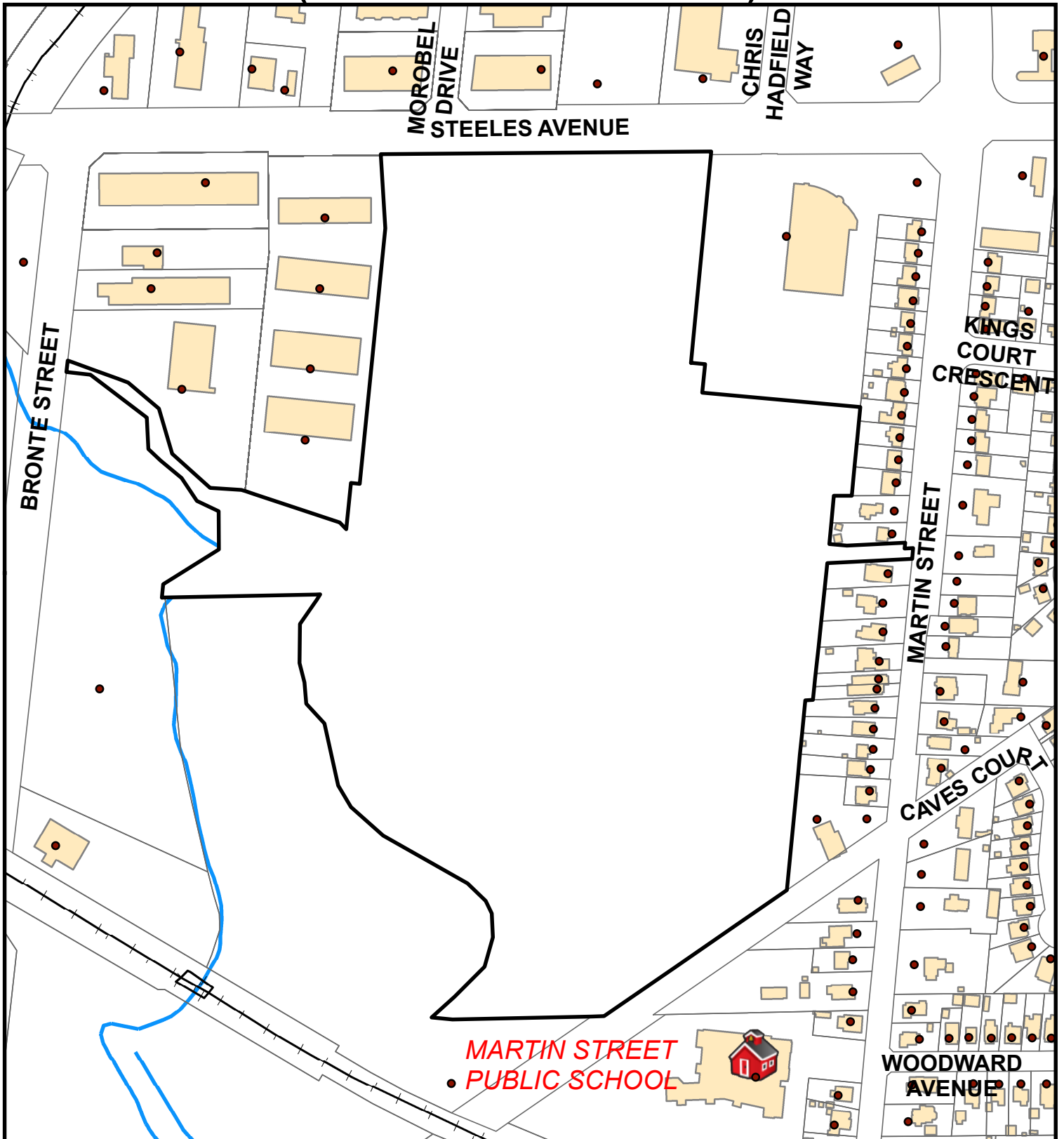
MILTON

FIGURE 1 LOCATION MAP

(150 Steeles Avenue East)



MILTON



Council Meeting Date:
December 18, 2023

Scale: 1: 3,333

Files: Z-06/23

Development Services Department



Subject Property
Page 186 of 365

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THE CORPORATION OF THE TOWN OF MILTON

BY-LAW XXX-2023

BEING A BY-LAW TO AMEND THE TOWN OF MILTON COMPREHENSIVE ZONING BY-LAW 016-2014, AS AMENDED, PURSUANT TO SECTION 34 OF THE *PLANNING ACT* IN RESPECT OF THE LANDS DESCRIBED AS PART OF LOT 15, CONCESSION 2, FORMER GEOGRAPHIC TOWNSHIP OF TRAFALGAR, TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (150 STEELES MILTON INC.) - FILE: Z-06/23

WHEREAS the Council of the Corporation of the Town of Milton deems it appropriate to amend Comprehensive Zoning By-law 016-2014, as amended;

AND WHEREAS the Town of Milton Official Plan provides for the lands affected by this by-law to be zoned as set forth in this by-law;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Schedule A to Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by changing the existing Business Park Site Specific (M1*38) zone symbol to the Natural Heritage System (NHS) zone symbol on the land shown on Schedule A attached hereto.
2. If no appeal is filed pursuant to Section 34(19) of the *Planning Act*, R.S.O. 1990, c. P.13, as amended, or if an appeal is filed and the Ontario Land Tribunal dismisses the appeal, this by-law shall come into force on the day of its passing. If the Ontario Land Tribunal amends the by-law pursuant to Section 34 (26) of the *Planning Act*, as amended, the part or parts so amended come into force upon the day the Tribunal's Order is issued directing the amendment or amendments.

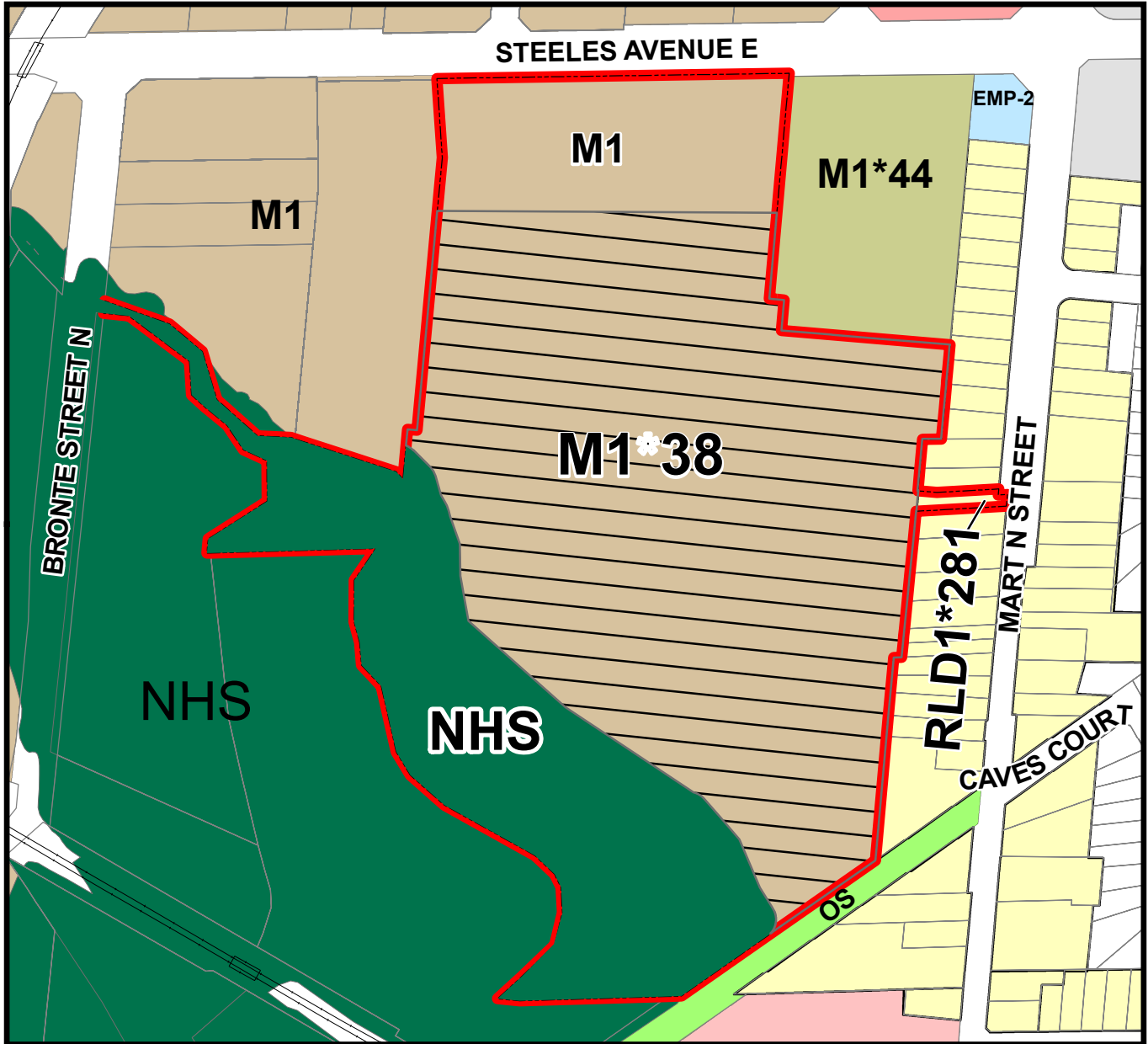
PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

Gordon A. Krantz Mayor

Meaghen Reid Town Clerk

SCHEDULE A
TO BY-LAW No. -2023






TOWN OF MILTON
150 Steeles Avenue East
PART OF LOT 15, CONCESSION 2 AND PART OF LOT 6, REGISTERED PLAN 364
Town of Milton



THIS IS SCHEDULE A
TO BY-LAW NO. _____ PASSED
THIS ___ DAY OF _____, 2023.

MAYOR - Gordon A. Krantz

CLERK- Meaghan Reid

-  RLD1*281 - Site Specific Low Density Residential Zone I
-  M1*38 - Site Specific Business Park Zone
-  NHS - Natural Heritage System
-  M1 - Business Park Zone
-  Subject Lands





The Corporation of the Town of Milton

Report To: Council

From: Jill Hogan, Commissioner, Development Services

Date: December 18, 2023

Report No: DS-062-23

Subject: Technical Report: Zoning By-law Amendment Application by Menkes Milton Industrial Inc. applicable to lands legally described as Part of Lot 13, Concession 5, former Geographic Township of Trafalgar and municipally known as 7472 Fifth Line. (Z-14/22)

Recommendation: **THAT Report DS-062-23 outlining an amendment to to the Town of Milton Zoning By-law 016-2014, as amended, to facilitate the development of an industrial building BE APPROVED;**

AND THAT staff be authorized to bring forward an amending Zoning By-law in accordance with Appendix 1 to Report DS-062-23 for Council adoption;

AND THAT the Commissioner of Development Services forward this report to the Provincial Ministers of Health, Education, Transportation and Infrastructure and Metrolinx with a request to review and plan for future Milton District Hospital, school and transportation expansions;

AND FURTHER THAT the Commissioner of Development Services forward a copy of this report and Decision to the Region of Halton for their information.

EXECUTIVE SUMMARY

Menkes Milton Industrial Inc. has applied for a zoning by-law amendment to the Town of Milton Zoning By-law 016-2014, as amended, for the lands located at 7472 Fifth Line. The purpose of the zoning by-law amendment is to rezone the subject lands from Future Development (FD) zone to a site-specific Business Park with a Holding (M1*339*H80) zone to facilitate the development of one industrial building that is approximately 148,405 square feet (13,787 square metres) in size.

EXECUTIVE SUMMARY

The statutory public meeting was held on March 27, 2023. No members of the public spoke at the meeting and staff have not received any written concerns or objections to the proposed zoning by-law amendment.

All internal Town of Milton departments and responding external agencies have provided correspondence to Town Planning staff indicating their support for the application as currently presented. Planning staff have reviewed all of the documentation, plans and comments provided to date and is of the opinion that the application as submitted has been prepared in a manner that would allow it to be considered by Town Council for approval.

Conclusions and Recommendations

Staff is satisfied that the proposed zoning by-law amendment, attached as Appendix 1 to this report, is consistent with the land use policies of the Provincial Policy Statement and conforms to the Regional and Town Official Plans. Therefore, staff recommends approval of the zoning by-law amendment as presented through this report.

REPORT

Background

Owner: Menkes Milton Industrial Inc., 4711 Yonge Street, Suite 1400, Toronto, ON.

Applicant: Menkes Milton Industrial Inc., 4711 Yonge Street, Suite 1400, Toronto, ON.

Location/Description: The subject lands are located in Ward 2, southwest of the intersection of Main Street East and Fifth Line and are municipally known as 7472 Fifth Line. Figure 1 to this report illustrates the location of the subject lands. The subject lands comprise an area of approximately 2.72 hectares and are currently vacant.

Town easements that contain a box sewer are located on the subject lands along the street frontages of Main Street East and Fifth Line. A small segment of the subject lands, located on the south-east corner along Fifth Line, is also regulated by Conservation Halton.

The subject lands are surrounded by lands that are designated for employment uses. The current surrounding uses include a place of worship and agricultural uses to the north, employment uses to the east and vacant lands and the Hydro One Corridor to the south and west.

Proposal: The applicant has applied for a zoning by-law amendment to facilitate the development of a one-storey industrial warehouse building (148,405 square feet or 13,787

Background

square metres) with one access from Main Street East and another from Fifth Line. The proposed building includes a flexible layout accommodating either one larger tenant or two smaller tenants. Figure 2 to this report includes the proposed site plan and site statistics. Figure 3 to this report includes an architectural rendering of the proposed building.

A loading court with 24 loading bays is proposed on the south side of the building. A screening wall for loading bays. Surface parking, including accessible and carpool spaces, is generally located along the east and west boundaries of the subject lands. There are 20 bicycle spaces proposed to be located at the northeast and northwest corners of the proposed building.

Landscaped areas are also proposed along the street frontages of Main Street East and Fifth Line.

The following reports have been submitted in support of this application:

- Planning Justification Report;
- Draft Zoning By-law;
- Urban Design Brief;
- Architectural Elevations and 3D Perspective;
- Subwatershed Impact Study Addendum;
- Site Plan and Site Details;
- Civil Drawing Package;
- Archaeological Clearance;
- Stage 1 and 2 Archaeological Assessment;
- Geotechnical Investigation;
- Hydrogeological Report
- Functional Servicing Report;
- Stormwater Management Report;
- Transportation Impact Study;
- Truck Access and Circulation Plan;
- Noise and Vibration Impact Assessment; and,
- Exterior Lighting Plan.

Background

The subject lands are designated Urban Area in the Halton Region Official Plan. The subject lands are also subject to the Employment Area overlay in the Halton Region Official Plan. The Employment Area overlay speaks to protecting and preserving Employment Areas for current and future uses, ensuring the necessary infrastructure is provided to support the development and prohibits incompatible uses. Regional staff is satisfied that the proposed industrial use constitutes a complementary employment use within the Employment Area.

The Halton Region Official Plan also requires the applicant of a development proposal on contaminated lands to undertake the necessary steps to bring the lands to a condition suitable for redevelopment, in accordance with Halton Region's Protocol for Reviewing Development Applications with Respect to Contaminated or Potentially Contaminated Sites. The Phase 2 Environmental Site Assessment Report identified soil exceedances on the subject lands. In this regard, the Region has requested a Holding provision be applied in the zoning by-law amendment that requires the applicant to remediate the site prior to Site Plan Approval.

On the basis of the above, Regional staff are satisfied that the proposed zoning by-law amendment conforms to the Regional Official Plan and is consistent with and conforms to Provincial policies.

The subject lands are designated Business Park Area on Schedule B - Urban Land Use Plan of the Town of Milton Official Plan. The Business Park Area designation is an employment designation that permits a range of uses. Section 3.8.2.2 of the Town's Official Plan sets out the permitted uses in this designation and these include: light industrial and office uses as well as accessory service, wholesale, retail and office uses directly related to and within the industrial building, research and development uses (excluding biomedical waste) and restaurants that are part of and located wholly within a light industrial or office building, other than an industrial mall. A number of uses are not permitted within this land use designation and these include: truck terminals, fuel depots, cement batching and asphalt plants as well as waste management or composting facilities.

The subject lands are also designated Business Park Area on Schedule C.9.B - Derry Green Corporate Business Park Secondary Plan ('Derry Green SP') in the Town's Official Plan. The Derry Green SP indicates that the permitted uses are the same as those contained in Section 3.8.2.2 of the Town's Official Plan. However, the Derry Green SP permits limited open storage at the rear of a lot, subject to a zoning by-law amendment, where it can be demonstrated to the Town that the open storage is buffered by landscaping, berms or other screening mechanisms.

Background

In addition to the above, Schedule C-9-B of the Derry Green SP identifies the general location of Stormwater Management Facilities, which includes a facility on the southwest corner of the subject lands. The applicable policies require the final location and configuration of such facilities to be refined through an applicable Subwatershed Impact Study (SIS). To support the proposed development, the applicant submitted a SIS addendum that has been reviewed concurrently with this application. It is anticipated that the SIS addendum will be complete in the near future.

Schedule C-9-C of the Derry Green SP identifies the subject lands as being within the Phase 3 area of the phasing plan. Development of Phase 3 lands requires that 60% of the Phase 2 lands to be registered within a Plan of Subdivision or an approved site plan, which has not yet occurred, however the Town's Official Plan permits exceptions to this requirement for significant employment where the Region confirms there is available servicing capacity and where Council determines that the proposal meets the general goal and objectives of the Derry Green SP and that there are no unacceptable negative impacts. While the applicant has not secured an end user, it is anticipated that the proposed development will generate approximately 300 jobs. Staff are of the opinion that the proposed development constitutes locally significant employment.

The applicant will be required to construct a 300 mm local watermain that will connect to the trunk watermain on Fifth Line in order to provide water services to the subject lands. Regional staff have requested a Holding provision be applied to ensure that water services are in place and viable to support the development. Staff are of the opinion that the proposed development implements the policies of the Derry Green SP, that there are no foreseeable negative impacts to the Town or Halton Region and that the development proposal should be supported.

In addition to the above, the Town's Official Plan also includes policies that require the implementation of travel demand management (TDM) measures for industrial uses that exceed 9,290 square metres and when a reduced parking rate is being proposed. The applicant has submitted a Traffic Impact Study that includes TDM measures for the subject lands and provides justification for the proposed reduced parking rate. The Town's Traffic staff are satisfied that the Traffic Impact Study adequately justifies the proposed reduced parking rate and that the TDM measures are appropriate for the subject lands.

Staff reviewed the application in relation to the policies of the Provincial Policy Statement (2020), the Growth Plan (2019), the Halton Region Official Plan and the Town of Milton Official Plan. Town staff and our agency partners are satisfied that the application for the

Background

zoning by-law amendment as presented through this report, conforms to the applicable Provincial, Regional and Town land use planning policies and regulations.

Zoning By-law 016-2014, as amended

The subject lands are currently zoned Future Development (FD) in the Town's Urban Zoning By-law 016-2014, as amended. The subject lands are proposed to be placed in a site-specific Business Park with a Holding (M1*399*H80) zone to facilitate the proposed development. The site-specific zoning has been updated to ensure conformity with the Derry Green Corporate Business Park Secondary Plan as noted above, as well as apply site-specific provisions specific to the development. The site-specific provisions set out a list of the only permitted uses on the subject lands, which include an industrial use, office building, office use, accessory outdoor storage, research and technology use, adult education school, warehouse/distribution centre and a wholesale operation.

The additional site-specific provisions relate to a reduced front yard setback, reduced parking rate, reduced setbacks for parking areas, permission for landscaped area within an easement and requirement for accessory outdoor storage to be screened from the public street.

The Region has also requested a Holding Provision (H80) be applied to address contamination and servicing matters for the subject lands. The first condition requires the applicant to remediate the contaminated areas on the subject lands and provide an environmental audit to the Region to confirm that the environmental condition is suitable for development. The second condition is that the applicant demonstrate that local water services are in place on Fifth Line and viable and enter into a Servicing Agreement with the Region.

Should the application be approved, the applicant is required to obtain Site Plan Approval prior to building permit issuance. Detailed site plan drawings addressing such matters as building elevations and urban design, lot grading and drainage, lighting and landscaping will be reviewed through this process.

A draft zoning by-law amendment is attached to this report as Appendix 1.

Discussion

Public Consultation and Review Process

Notice of a complete application was provided on December 20, 2022. In accordance with the Planning Act requirements and Town policies, notice for the statutory Public Meeting was

Discussion

provided on March 2, 2023 through written notice to all properties within 200 metres of the subject lands and an advertisement was placed in the Milton Canadian Champion. The statutory Public Meeting was held on March 27, 2023. No members of the public spoke at the statutory Public Meeting and staff have not received any written submissions on the proposed zoning by-law amendment.

Agency Consultation

The proposed zoning by-law amendment and all supportive documents were circulated to both internal and external commenting agencies. Halton Region, Conservation Halton, Town departments and other agencies offered no objection to the proposed zoning by-law amendment.

Summary of Issues

Servicing

Trunk watermains are available along Main Street East and Fifth Line, however the Region generally prohibits direct service connections to trunk watermains and requires extensions of local mains at the owner's expense to service individual development sites. Given that there is no local watermain available at this time to service the subject lands, the applicant is responsible for constructing a new 300 mm local watermain along Fifth Line to service the subject lands. In order to ensure that the proposed development has adequate servicing, the Region has requested that the proposed zoning by-law amendment include a Holding provision that requires the owner to demonstrate that the local water services are in place to service the subject lands and to enter into a Servicing Agreement prior to Site Plan Approval for the proposed development.

Contamination

To support the development proposal, the applicant was required to submit an Environmental Site Assessment to determine if there is any potential contamination on the site. The applicant completed an Environmental Site Assessment which identified soil exceedances on the subject lands surrounding the area where a former house and pond were located. The soil impacts render the material not suitable for geotechnical purposes and the applicant is required to remove the contaminated soil from the subject lands. Remediation works are required to be completed prior to development. On this basis, the Region requested that the proposed zoning by-law amendment include a Holding provision that requires the owner to remediate the site and provide the Region with an environmental audit that indicates that the site is suitable for development.

Parking

Discussion

For industrial and warehouse/distribution centre uses, the Town's Urban Zoning By-law applies a parking rate based on the gross floor area. Because the proposed industrial building is contemplated as accommodating two units, the parking rate is applied to each of the units. In this regard, under the current provisions a minimum of 158 parking spaces would be required for the entire proposed development.

The applicant has proposed a reduced parking rate for the industrial and warehouse/distribution centre uses. To support the proposal, the applicant submitted a Traffic Impact Study that included parking justification for the reduced rate. The study analysed the anticipated parking demand at peak periods and it was determined that the typical peak parking demand would require 52 parking spaces.

The proposed reduced parking ratio would require a minimum of 69 parking spaces, however it is noted that the proposed Site Plan includes 77 parking spaces. Town Traffic staff have reviewed the TIS and parking justification and are satisfied that the proposed provides adequate parking on the site. Traffic Demand Measures have also been identified to support the proposed parking reduction and will be incorporated into the future Site Plan Agreement.

Landscaping

Town easements are located on the subject lands along both of the street frontages of Main Street East and Fifth Line. The Town easements contain a box sewer that runs along Main Street East and then to the south along the west side of Fifth Line before crossing to the east side of Fifth Line. Typically the Town does not permit landscaped areas on encumbered lands (e.g. within an easement area), however the Town's Official Plan and the Urban Design Guidelines for the Derry Green Secondary Plan area encourage landscaping with trees, shrubs and native plantings within front yards and along street frontages and edges.

On the basis of the above, the applicant has prepared a Landscape Plan that meets the general landscape area requirements of the Town's zoning by-law (albeit within an easement area) including trees, shrubs and sod along the street frontages. Sod is the only vegetation located directly above the box sewer in the scenario that the Town is required to access the box sewer for maintenance or repairs. Staff is satisfied that the proposed Landscape Plan implements the Town's Official Plan and Urban Design Guidelines for the Derry Green Secondary Plan area.

Conclusion

Planning staff is satisfied that the proposed zoning by-law amendment, attached as Appendix 1, is consistent with the land use policies of the Provincial Policy Statement and conforms to



Discussion

the Regional and Town Official Plans. Therefore, staff recommends approval of the zoning by-law amendment as presented through this report.

Financial Impact

None arising from this report.

Respectfully submitted,

Jill Hogan
Commissioner, Development Services

For questions, please contact: Jessica Tijanic MSc., MCIP, RPP Phone: Ext. 2221
Senior Planner, Development
Review

Attachments

- Figure 1 - Location Map
- Figure 2 - Proposed Site Plan and Statistics
- Figure 3 - Proposed Architectural Rendering
- Appendix 1 - Zoning By-law Amendment

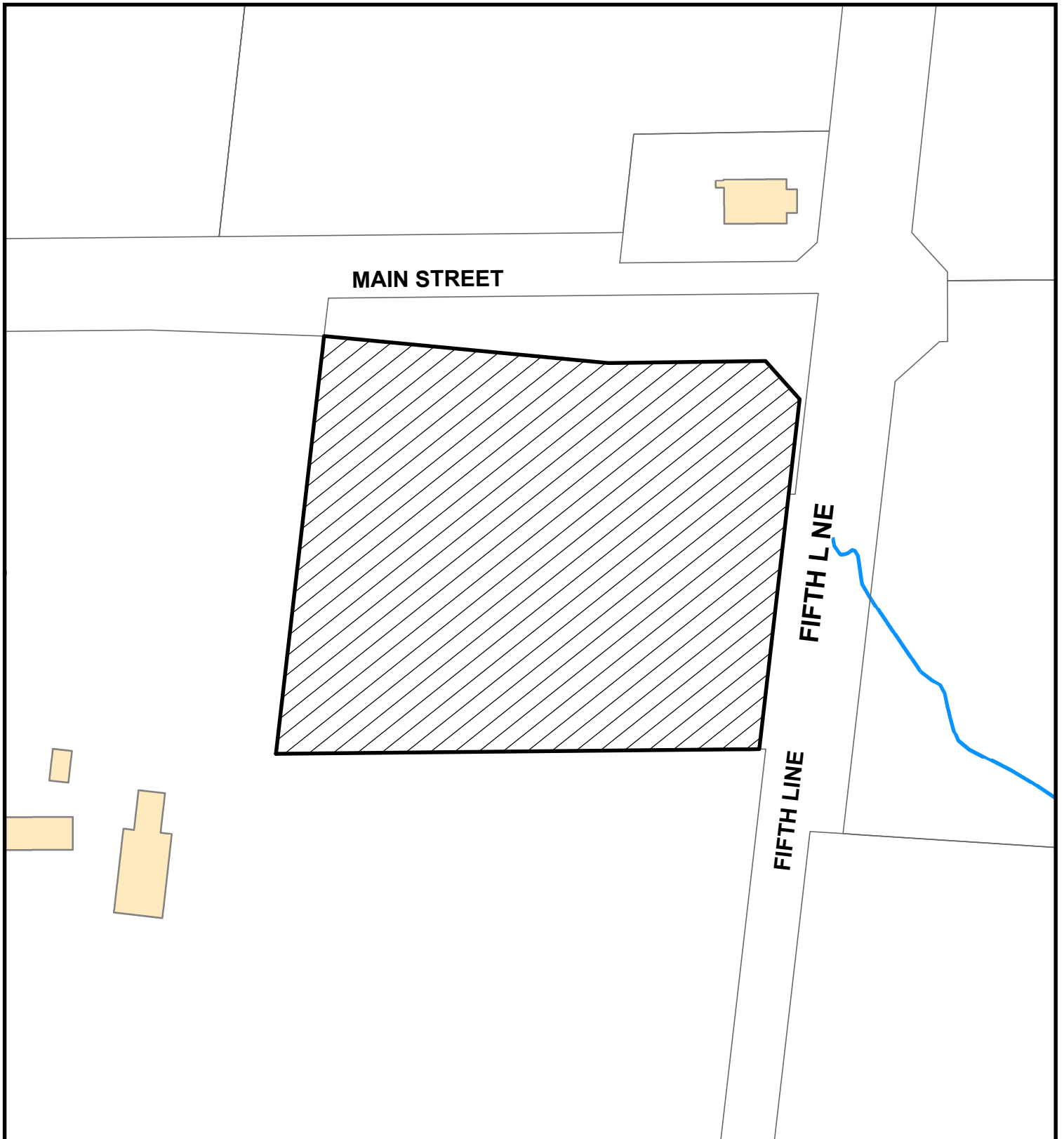
Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

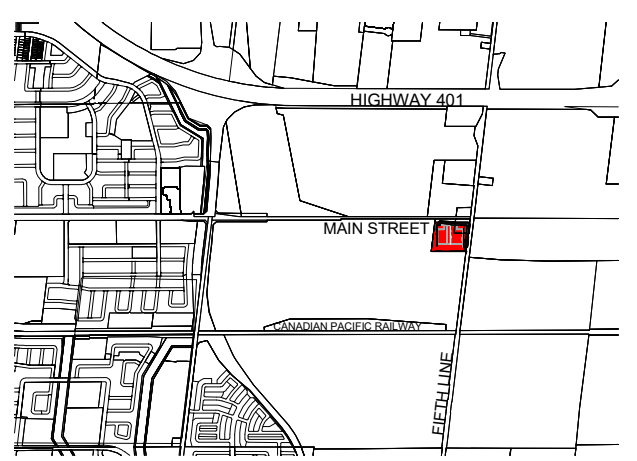


FIGURE 1 LOCATION MAP (7472 Fifth Line)



Council Meeting Date: December 18, 2023	Scale: 1: 2,000	Files: Z-14/22	Development Services Department
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The issue of this report drawing is a representation by Turner Fleischer Architects Inc. that the construction, arrangement or location of the items shown is intended to comply with applicable laws, regulations, codes, standards, and other requirements. It is not intended to be used for any other purpose. The client is responsible for ensuring that the information provided is accurate and complete. Turner Fleischer Architects Inc. shall not be held responsible for the accuracy or completeness of the information provided by the client.



LEGEND

- PROPOSED ENTRANCE ARROW
- PROPOSED EXIT ARROW
- PROPOSED FIRE HYDRANT
- PROPOSED SIAMESE CONNECTION
- PROPOSED SIGN
- PROPOSED FIRE & TRUCK ROUTE (HEAVY DUTY ASPHALT)
- PROPOSED CONCRETE SIDE WALK
- PROPOSED CONCRETE APRON
- LANDSCAPED AREA

NOTE:
- MUNICIPAL DRAWINGS OF MAIN STREET EAST AND FIFTH LINE HAVE BEEN PROVIDED ON 2022-08-23.
- SNOW STORAGE TO BE REMOVED AND STORED OFFSITE BY A PRIVATE CONTRACTOR.

#	DATE	DESCRIPTION	BY
25	2023-10-23	ISSUED FOR SPA	MHB
24	2023-08-21	ISSUED FOR SPA	RLA
23	2023-05-17	ISSUED FOR COORDINATION	RLA
22	2023-08-10	ISSUED FOR COORDINATION	RLA
21	2023-08-03	ISSUED FOR COORDINATION	RLA
20	2023-07-28	ISSUED FOR COORDINATION	LLJ
19	2023-07-25	ISSUED FOR SPA	RLA
18	2023-07-19	ISSUED FOR CLIENT REVIEW	RLA
17	2023-06-27	ISSUED FOR CLIENT REVIEW	RLA
16	2023-06-15	ISSUED FOR CLIENT REVIEW	RLA
15	2023-05-31	ISSUED FOR RESUBMISSION	AAB
14	2023-05-29	ISSUED FOR REVIEW	AAB
13	2023-05-12	ISSUED FOR REVIEW	AAB
12	2023-04-18	ISSUED FOR COORDINATION	RLA
11	2023-03-23	ISSUED FOR REVIEW	RLA
10	2023-03-09	ISSUED FOR REVIEW (SHEET)	RLA
9	2023-01-26	ISSUED FOR COORDINATION	RLA
8	2022-12-09	ISSUED FOR REVIEW	RLA
7	2022-12-06	ISSUED FOR COORDINATION	RLA
6	2022-11-08	ISSUED FOR COORDINATION	RLA
5	2022-10-11	ISSUED FOR COORDINATION	RLA
4	2022-06-28	ISSUED FOR COORDINATION	RLA
3	2022-06-17	ISSUED FOR COORDINATION	RLA
2	2022-06-09	ISSUED FOR COORDINATION	RLA
1	2022-06-03	ISSUED FOR COORDINATION	RLA



MENKES COLERAIN INC.
4711 YONGE STREET, SUITE 1400
TORONTO, ON, M2N 7E4

PROJECT **WAREHOUSE**
SITE PLAN FILE NUMBER SP-34/22
7472 FIFTH LINE
MILTON, ON

SPA SITE PLAN

PROJECT NO. 22.067
PROJECT DATE 2022-05-30

DRAWN BY RLA
CHECKED BY JJJ
SCALE As indicated

ZONING AND STATS

SITE A - AREA	±6.71 ACRES	±2.72 HA
BUILDING A AREA	±148,405 S.F.	±13,787 S.M.
UNIT 1 WAREHOUSE	±82,037 S.F.	±7,621 S.M.
UNIT 2 WAREHOUSE	±48,249 S.F.	±4,482 S.M.
EXIT CORRIDOR	±1,040 S.F.	±97 S.M.
ACCESSORY OFFICE SPACES	±15,780 S.F.	±1,468 S.M.
ME ROOM & SPRINKLER	±1,300 S.F.	±121 S.M.
TOTAL LEASIBLE AREA (GFA)	±147,105 S.F.	±13,667 S.M.

PARKING REQUIRED BY ZONING BY-LAW - 016-2014
FIRST 1,000 S.M. - 1 PARKING SPACE PER 30 S.M. OF GFA
GFA RANGE BETWEEN 1,001 TO 5,000 S.M. - 1 SPACE PER 100 S.M. OF GFA
GREATER THAN 5,000 S.M. OF GFA - 1 SPACE PER 200 S.M. OF GFA

UNIT 1	86.4 SPACES
UNIT 2	68.1 SPACES
TOTAL PARKING REQUIRED	155 SPACES
1,051,000 S.F.	1.13/100 S.M.

PROPOSED INDUSTRIAL PARKING RATE
FIRST 5,000 S.M. OF GFA - 1 PARKING SPACE PER 175 S.M. OF GFA
GREATER THAN 5,000 S.M. OF GFA - 1 SPACE PER 200 S.M. OF GFA

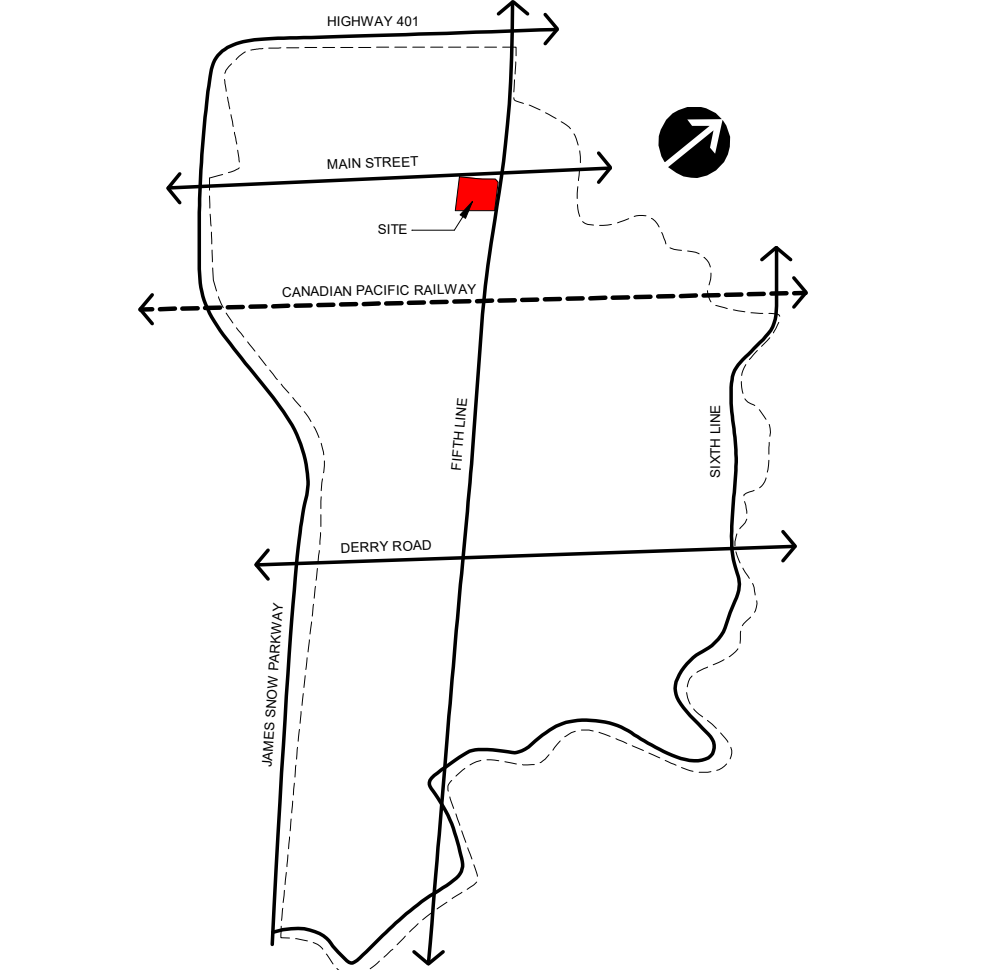
UNIT 1	41.7 SPACES
UNIT 2	25.6 SPACES
PARKING REQUIRED (TOTAL)	68 SPACES

PROPOSED PARKING SUPPLY	6 SPACES
BARRIER FREE PARKING PROVIDED	3 SPACES
TYPE A	3 SPACES
TYPE B	3 SPACES
CARPOOL SPACES PROVIDED	4 SPACES
TOTAL PARKING PROVIDED	77 SPACES
0.52/1000 S.F.	0.56/100 S.M.

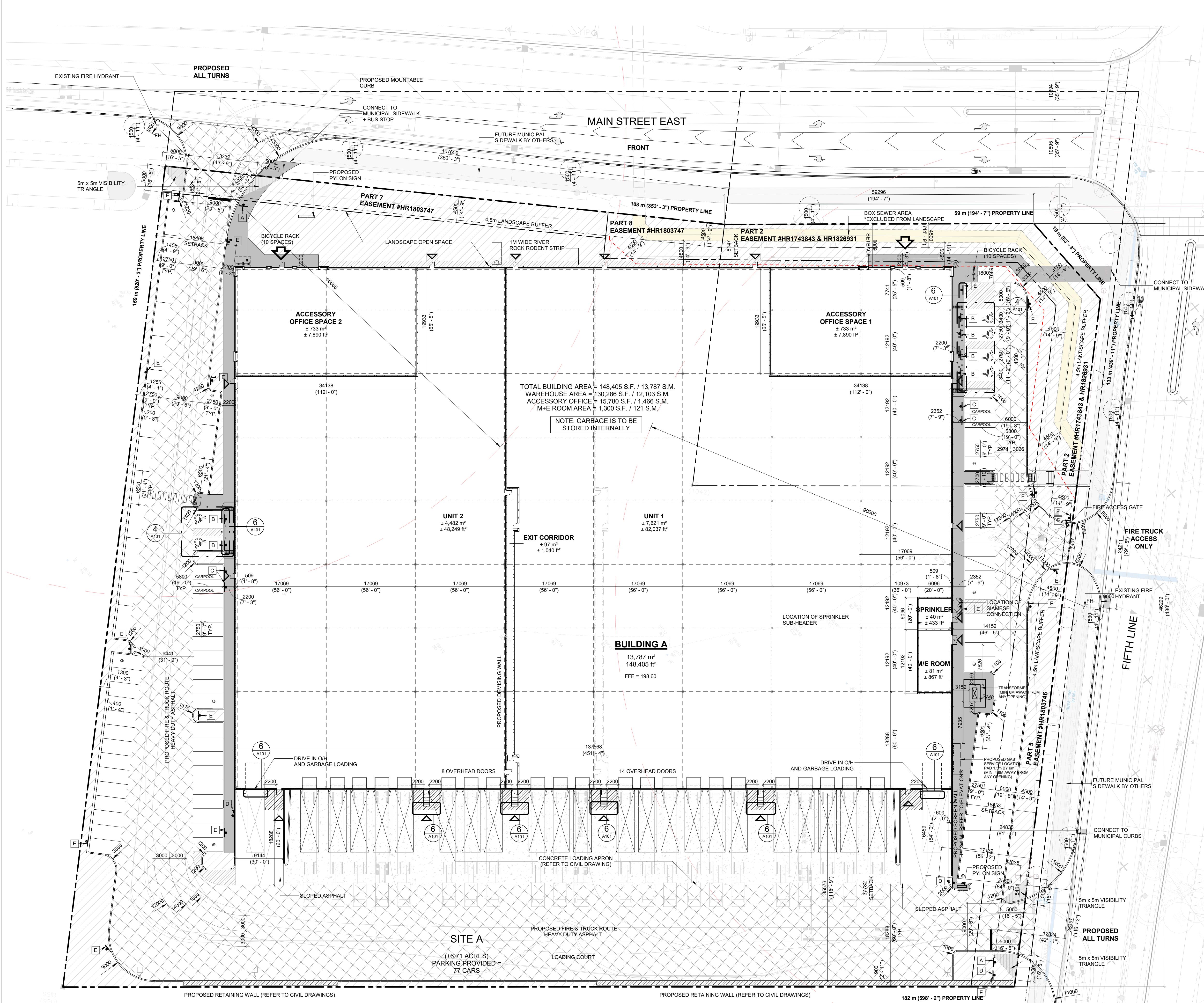
BICYCLE SPACES REQUIRED	12 SPACES
BICYCLE SPACES PROVIDED 0.8M X 1.8M	20 SPACES
LOADING SPACES REQUIRED (3+19,300 S.M.)	4 SPACES
3 SPACES FOR FIRST 7,441 S.M.	3 SPACES
19,300 S.M. THEREAFTER (90% GFA)	1 SPACES
LOADING SPACES PROVIDED 3.5M X 12.0M	24 SPACES

M1 ZONE / BUSINESS PARK	REQUIRED	PROPOSED
BUILDING COVERAGE	N/A	51%
FRONT YARD	9.0 M	8.09 M
REAR YARD	12.0 M	37.7 M
INT. YARD	3.0 M	15.4 M
EXT. YARD	9.0 M	16.4 M
MIN. GFA INDEX	N/A	-
MAX. BUILDING HEIGHT	15.0 M	14.84 M

LANDSCAPE	10%	10.00%
LANDSCAPE BUFFER		
ABUTTING A STREET LINE	4.5 M	4.5 M
LANDSCAPE AREA WITHIN EASEMENTS	6.38%	±1,731 S.M.
LANDSCAPE AREA OUTSIDE OF EASEMENT	4.80%	±1,305 S.M.
TOTAL LANDSCAPE AREA	11.18%	±3,036 S.M.



KEY MAP
N.T.S.



1 SITE PLAN
A100 1:350

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW XXX-2023

BEING A BY-LAW TO AMEND THE TOWN OF MILTON COMPREHENSIVE ZONING BY-LAW 016-2014, AS AMENDED, PURSUANT TO SECTION 34 OF THE *PLANNING ACT* IN RESPECT OF THE LANDS DESCRIBED AS 7472 FIFTH LINE, PART OF LOT 13, CONCESSION 5, NEW SURVEY, FORMER GEOGRAPHIC TOWNSHIP OF TRAFALGAR, TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (MENKES MILTON INDUSTRIAL INC.) - FILE: Z-14/22

WHEREAS the Council of the Corporation of the Town of Milton deems it appropriate to amend Comprehensive Zoning By-law 016-2014, as amended;

AND WHEREAS the Town of Milton Official Plan provides for the lands affected by this by-law to be zoned as set forth in this by-law;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Schedule A to Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by changing the existing Future Development (FD) zone symbol to a site specific Business Park (M1*339) symbol on the land and adding the Holding (H) Symbol H80 on this property as shown on Schedule A attached hereto.
2. **THAT** Section 13.1.1 of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding Section 13.1.1.339 to read as follows:

Notwithstanding any provisions of the By-law to the contrary, for lands zoned the following standards and provisions shall apply:

- a. Notwithstanding Section 8.1 - Table 8A Permitted Uses, only the following uses shall be permitted:
 - i. Industrial Use;
 - ii. Accessory Outdoor Storage;
 - iii. Office Building;
 - iv. Office Use;
 - v. Research & Technology Use;
 - vi. School, Adult Education;
 - vii. Warehouse/Distribution Centre; and,

viii. Wholesale Operation.

b. Special Site Provisions:

For lands zoned Business Park (M1*339) the following additional special site provisions shall apply:

- i. Notwithstanding section 13.1.1.339.A, *Outdoor Storage* is permitted accessory to a permitted *Industrial Use* and/or *Warehouse/Distribution Centre* subject to the required setbacks and lot coverage provisions applicable to the principal use. Accessory *Outdoor Storage* shall be permitted in the *rear yard* and *interior side yard* provided that it is screened from the public street and is not located on any required parking spaces.
 - ii. Notwithstanding the definition of *front lot line*, the *lot line* abutting Main Street East shall be considered the *front lot line*.
 - iii. Notwithstanding the definition of *landscape buffer* and *landscape open space*, landscaping in a *landscape* buffer or *landscape open space* may be located within an easement.
 - iv. Notwithstanding Section 5.8.2, Table 5G, the minimum off-street parking requirement for each individual *Industrial Use* and *Warehouse/Distribution Centre*, including accessory office space, shall be as follows:
 1. For the first 5,000 m², 1 *parking space* per 175 m² of *gross floor area* shall be provided.
 2. For additional *gross floor area* above 5,000 m², 1 *parking space* per 200 m² of *gross floor area* shall be provided.
 - v. Notwithstanding Section 5.11.1, Table 5K, *loading spaces* shall be permitted to be setback up to 17 metres from a *street line*.
 - vi. Notwithstanding Section 5.12, Table 5L, *parking areas* are permitted to be setback within
 1. 0.0 metres from the southerly line; and,
 2. 1.2 metres from westerly property line.
 - vii. Notwithstanding Section 8.2, Table 8B, a minimum front yard of 8.0 metres shall be permitted.
3. **THAT** Section 13.2 (Holding Provisions) of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding the following conditions for removal of this H80 Holding Provision:

“H80” shall not be removed until:

- a) That the owner agrees to demonstrate to the Regional Municipality of Halton that local water services are in place and viable for the site at 7472 Fifth Line.

Through the related Site Plan Control process (SP-34/22), the owner shall contact the Regional Services Permit Section for review and approval of the proposed servicing, to obtain a Regional Services Permit, and pay all necessary fees.

- b) The owner submits to the Regional Municipality of Halton Region an environmental audit which indicates that the environmental condition of the site is suitable for the proposed land use and any supplementary remediation/risk assessments to ensure there are no inherent contaminations within the lands prior to any site alteration.

The Owner is required to comply with Ontario Regulation 153/04 and Halton’s Protocol for Reviewing Development Applications with respect to Contaminated or Potentially Contaminated Sites.

4. **THAT** Section 13.2 (Holding Provisions) of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding subsection 13.2.1.126 as follows:

For lands zoned Business Park Special Provision 339 (M1*339) on the property described as 7472 Fifth Line and legally described as Part of Lot 13, Concession 5, N.S. (Trafalgar), only legally established existing uses are permitted until the conditions for removal identified in the “H80” Holding Provision are satisfied.

5. If no appeal is filed pursuant to Section 34(19) of the *Planning Act*, R.S.O. 1990, c. P.13, as amended, or if an appeal is filed and the Ontario Land Tribunal dismisses the appeal, this by-law shall come into force on the day of its passing. If the Ontario Land Tribunal amends the by-law pursuant to Section 34 (26) of the *Planning Act*, as amended, the part or parts so amended come into force upon the day the Tribunal’s Order is issued directing the amendment or amendments.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

Gordon A. Krantz Mayor

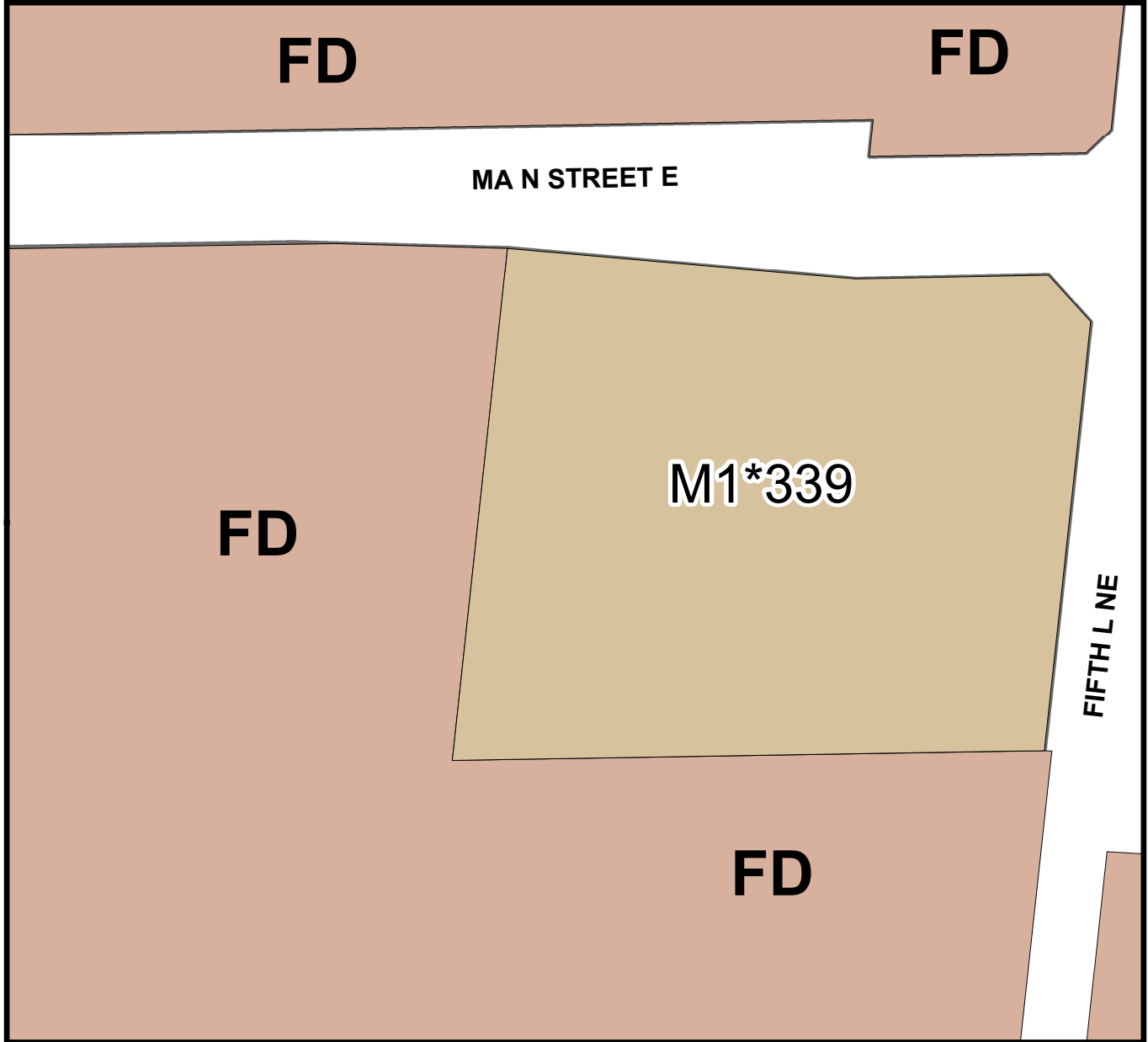
_____ Town Clerk
Meaghen Reid

SCHEDULE A
TO BY-LAW No. -2023

TOWN OF MILTON

7472 Fifth Line
TRAFALGAR CON 5 NS PT LOT 13
RP 20R18236 PARTS 1 TO 3 RP 20R21568 PARTS 2 3 5 7 TO 9 IRREG 6.71AC FR D

Town of Milton



THIS IS SCHEDULE A
TO BY-LAW NO. _____ PASSED
THIS __ DAY OF _____, 2023.



M1*339 - Site Specific Business Park Zone



FD - Future Development Zone

MAYOR - Gordon A. Krantz

CLERK- Meaghan Reid





The Corporation of the Town of Milton

Report To: Council

From: Jill Hogan, Commissioner, Development Services

Date: December 18, 2023

Report No: DS-065-23

Subject: Technical Report: Zoning By-law Amendment Application by Boyne Urban Development Inc. applicable to lands known municipally as 8671 & 8751 Britannia Road (Town File: Z-02/21)

Recommendation: THAT Application Z-02/21 for an amendment to the Town of Milton Comprehensive Zoning By-law 016-2014, as amended, to change the current Future Development (FD) Zone to a Residential Medium Density II Special Provision 340 (RMD2*340) Zone to permit the development of 64 dwelling units (i.e. a combination of stacked townhouse and multiple dwelling units), BE APPROVED;

AND THAT staff be authorized to bring forward an amending Zoning By-law in accordance with the draft By-law attached as Appendix 1 to Report DS-065-23 for Council Adoption.

EXECUTIVE SUMMARY

The applicant has applied to amend the Town's Comprehensive Zoning By-law 016-2014, as amended, for lands located on the north side of Britannia Road between the Sixteen Mile Creek Valley lands and Thompson Road within the Boyne Survey Secondary Plan Area, and known municipally as 8671 & 8751 Britannia Road. The proposed development consists of 64 dwelling units (i.e. a combination of stacked townhouse and multiple dwelling units) within five (5), 3-storey development blocks connected by a one-way private road with access to/from the future Hickory Crescent that will be constructed as part of the adjacent Mil Con Three (Fieldgate) subdivision. The proposal also includes a combination of above grade garage, driveway and underground parking for residents, visitor parking along the private road, amenity areas and landscaping. The proposed amendment would change the current Future Development (FD) Zone to a Residential Medium Density II Special Provision 340 (RMD2*340) Zone to permit the development as proposed.



EXECUTIVE SUMMARY

All internal Town of Milton departments and responding external agencies have provided correspondence to Town Planning staff indicating their support for the application as currently presented. Staff has reviewed all of the documentation, plans and comments provided to date and is of the opinion that the application as submitted is prepared in a manner that would allow it to be considered by Town Council for approval.

Conclusions and Recommendations

Planning staff is satisfied that the proposed Zoning By-law Amendment is consistent with the policies of the Provincial Policy Statement and conforms to the Growth Plan, the Regional and Town Official Plans, and the Boyne Survey Secondary Plan. Therefore, staff recommends approval of the Zoning By-law Amendment attached as Appendix 1 to this report.

REPORT

Background

Owner: Boyne Urban Development Inc., 4275 Village Centre Court, Unit 102, Mississauga, Ontario

Agent: Korsiak Urban Planning, 277 Lakeshore Road East, Unit 206, Oakville, Ontario

Location/Description: The subject lands are located in Ward 3, on the north side of Britannia Road between the Sixteen Mile Creek Valley lands and Thompson Road within the Boyne Survey Secondary Plan Area. The lands are legally described as Part of Lot 6, Concession 3, New Survey, Former Geographic Township of Trafalgar and municipally known as 8671 and 8751 Britannia Road. A small residential reserve located between the new frontages of the aforementioned properties and the future Hickory Crescent to be constructed through the adjacent Mil Con Three Plan of Subdivision (24T-20005/M) to the north and west, has also been included as part of the subject property. Following registration of the Mil Con Three Subdivision, which is anticipated by the end of 2023, residential reserve Block 166 as identified on the draft M-Plan associated with the executed Mil Con Three subdivision agreement, will be transferred to the Owner of the subject lands for the purposes of access, infrastructure and landscaping. Until the transfer is complete, Fieldgate Developments has authorized staff to zone the sliver of land they still own along with the remainder of the lands

Background

owned by Boyne Urban Developments Inc. (BUDI). The location of the subject lands is illustrated in Figure 1 attached to this report.

The subject lands are approximately 0.8 hectares (1.98 acres) in size with an 80 metre frontage along Hickory Crescent, and contain two existing residential dwellings that will be demolished prior to construction. The subject lands are surrounded by a stormwater management pond and medium density residential development of the future Mil Con Three subdivision to the west and north, medium density residential development within the Mattamy Martin East subdivision to the northeast, Omagh Presbyterian Church to the east, and agricultural lands south of Britannia Road that are planned to be developed in the future as part of the Milton Phase 4 lands, specifically the Britannia Secondary Plan Area.

Proposal:

The applicant is seeking an amendment to the Town's Comprehensive Zoning By-law 016-2014, as amended, to permit the development of 64 dwelling units (i.e. a combination of stacked townhouse and multiple dwelling units) within five (5), 3-storey development blocks connected via a private one-way internal road that will have access points to/from Hickory Crescent (road to be provided through the Fieldgate - Mil Con Three subdivision). Once developed, the subject lands will no longer have access from Britannia Road.

Residential parking for the development will be provided as follows:

- Units within Blocks A & B: one parking space within the garage and a second parking space on an external driveway;
- Units within Block C: one parking space within the garage. These units are situated along the driveway similar to a rear lane townhouse dwelling; and,
- Units within Blocks D1 and D2: one parking space in the underground garage.

Visitor parking for all units will be provided along the private road within the site and three accessible spaces will be provided in an area internal to all of the buildings. Approximately 600 square metres of outdoor communal amenity space is proposed between Buildings B and C to serve the entire development, and roof top patios may also be available for some units. The proposal will be developed as a condominium. The proposed density of the development is 80 units per net hectare (upnh). A conceptual site plan, floor plans and building elevations are attached as Figures 2, 3 and 4 to this report.

It should be noted that the applicant did submit a consent application (B21/010/M) in March 2021 for the purposes of obtaining servicing connections from the Mattamy Martin East

Background

subdivision, given that the Mil Con Three subdivision application, which would provide the ultimate services was not advanced enough at that time to provide the connections. Given that there was a delay in the subject application and the Mil Con Three subdivision is now close to registration, the severance is no longer required.

The following information has been submitted in support of the Zoning By-law Amendment application:

- Topographic Survey, prepared by J.D. Barnes, dated April 14, 2020;
- Conceptual Site Plan (A100), prepared by McCallumSather, dated November 21, 2023;
- Underground Parking Plan (A200), prepared by McCallumSather, dated November 20, 2020;
- Conceptual Floor Plans and Roof Plans, prepared by McCallumSather, dated November 10 & 13, 2020;
- Concept Designs / Elevations, prepared by McCallumSather, dated October 15, 2020;
- Renderings, prepared by McCallumSather;
- Building Area Analysis, prepared by McCallumSather, dated November 06, 2020;
- Planning Justification Report, prepared by Korsiak Urban Planning, dated January 2021;
- Planning Justification Report Update, prepared by Korsiak Urban Planning, dated November 29, 2021;
- Stage 1 and 2 Archaeological Assessment, prepared by Golder Associates Ltd., dated January 10, 2019 (and Ministry of Culture, Sports and Tourism Clearance Letter, dated February 4, 2019);
- Phase 1 Environmental Site Assessment, prepared by Terraprobe Inc., dated January 31, 2019;
- Phase 1 Environmental Site Assessment Update, prepared by Terraprobe Inc., dated September 13, 2021;
- Phase 2 Environmental Site Assessment, prepared by Terraprobe Inc., dated April 22, 2019, and revised October 22, 2019 and September 14, 2021;
- Arborist Report, prepared by Bruce Tree Expert Company Ltd., dated December 7, 2020;
- Tree Protection Plan, prepared by Bruce Tree Expert Company Ltd., dated December 6, 2020;
- Geotechnical Report, prepared by Terraprobe Inc., dated June 26, 2019 and revised December 16, 2020;

Background

- Hydrogeological Report / Groundwater Control Measures, prepared by Terraprobe Inc., dated January 29, 2021 (Revision 1);
- Detailed Water Balance Assessment, Terraprobe Inc., dated August 16, 2021;
- Memorandum re: Addendum to Areas 5A, 5B and 6 Subwatershed Impact Study, prepared by David Schaeffer Engineering Ltd., dated October 23, 2020;
- Scoped Environmental Impact Study, prepared by Savanta, dated January 2021;
- Functional Servicing/Stormwater Management Report, prepared by S. Llewellyn & Associates Limited, dated November 2020 and revised November 2021;
- Preliminary Grading Plan (C101), Servicing Plan (C102), and Notes and Details (C103), prepared by S. Llewellyn & Associates Limited, dated November 2021;
- Noise Feasibility Study, prepared by HGC Engineering, dated December 14, 2020;
- Transportation Impact Study (Includes a Parking Analysis, Waste Management Strategy and Auto-turn Swept Path Analysis), prepared by GHD, dated October 2023;
- Urban Design Brief, prepared by McCallumSather, dated November 13, 2020 and revised December 8, 2021;
- Public Engagement Strategy, prepared by Korsiak Urban Planning, dated January 12, 2021; and,
- Draft Zoning By-law.

Planning Policy

Within the 2009 Halton Region Official Plan (ROP), the subject lands are designated Urban Area. Section 76 of the ROP establishes that the range of permitted uses and the creation of new lots within the Urban Area will be in accordance with the applicable Local Official Plans and Zoning By-laws. All development, however, shall be subject to the Regional Official Plan policies in effect. Regional staff have reviewed the application and are satisfied the development conforms to the Urban Area policies of the ROP.

At the local level, the subject lands are located within the Urban Area and are designated “Residential Area” on Schedule B -Urban Land Use Plan of the Town’s Official Plan and on Schedule C.10.C - Boyne Survey Secondary Plan Land Use Plan. The “Residential Area” designation in both the parent plan and the secondary plan, permits a full range of residential uses and densities, including Medium Density Residential II uses consisting of mid-rise multiple attached residential units such as stacked townhouses and apartments with a density range of greater than 45 to 100 units per net hectare (upnh) subject to specific policies.

Background

In addition, Schedule K - Intensification Areas of the Official Plan, shows that the subject lands are located along a designated Intensification Corridor (Britannia Road), which policies promote higher densities that support transit usage and active transportation.

Section 2.7 of the Official Plan states that the Town of Milton is committed to the provision of opportunities within the Town for the creation of housing which is affordable, accessible, adequate and appropriate to the full range of present and expected households. To achieve this, a number of overarching goals and objectives are identified in this Section, along with specific policies relating to housing targets, housing mix, affordability and intensification.

Notably, Section 2.7.1 sets out a series of goals to assist the Town in meeting current and future housing needs, which includes, but is not limited to the following:

- ensuring that an appropriate range and mix of housing by density, type and affordability are permitted within the Town to meet a wide range of needs of current and future households;
- encouraging the development industry to design innovative housing forms that stress flexibility in use, mix of compatible land uses, good environmental practices, incorporate universal physical access, public safety and security needs, cost-efficiency, affordability and energy and natural resource conservation while maintaining sound engineering and planning principles;
- fostering the creation of additional housing accommodation through various forms of residential intensification;
- encouraging the inter-mixing of different housing forms and types within neighbourhoods to foster community integration; and,
- making 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.

Section 3.2.1.2 of the Official Plan speaks to residential intensification. As stated in the opening paragraph of this section, intensification within the Residential Area designation shall be directed to the intensification areas and to nodes and corridors as identified on Schedule K and shall generally take the form of medium and high density residential uses. Intensification corridors are defined as intensification areas identified along major roads, arterials or higher order transit corridors that have the potential to provide a focus for higher density mixed use development consistent with planned transit service levels.

Lands located within designated greenfield areas, such as the subject lands, are also subject to the residential mix policies that apply to these areas. As stated in Section 3.2.1.7,

Background

residential development within designated greenfield areas shall in addition to the provisions of Section 2.7, Housing, and other applicable policies of the Plan:

- encourage an intermixing of dwelling unit types and densities;
- encourage a higher distribution of Medium Density II and High Density Residential Uses, particularly within nodes and along corridors;
- encourage medium and high density development that is street oriented; and,
- contribute toward achieving the density target set out in Section 2.1.4 and Regional Phasing set out in Section 2.1.5 of the Plan in order to contribute to the creation of healthy, complete communities.

Staff reviewed the application in relation to the policies of the Provincial Policy Statement (PPS), 2020, the Growth Plan, 2019, as amended by Amendment 1, 2020, the Halton Region Official Plan, the Town of Milton Official Plan, and the Boyne Survey Secondary Plan. Town staff and our agency partners are satisfied that the application for the zoning by-law amendment as presented through this report, conforms to the applicable Provincial, Regional and Local land use planning policies and regulations.

Zoning By-law 016-2014, as amended

The subject lands are currently zoned Future Development (FD) under Zoning By-law 016-2014, as amended, which only permits uses that legally existed on the date that the By-law came into effect.

The current Zoning By-law Amendment application proposes to rezone the subject lands from the current Future Development (FD) Zone to a Residential Medium Density II Special Provision 340 (RMD2*340) Zone to accommodate the proposed 64 dwelling units, and recognize site-specific provisions relating to the development including front, rear and side yard setbacks, the underground parking structure, parking area locations, minimum off-street parking requirements, widths of internal driveways, landscape open space, the description of a lot and that access that would typically apply to apartment buildings with one main entrance does not apply to site.

A draft amending Zoning By-law is attached as Appendix 1 to this report.

Site Plan Control

Should the Zoning By-law Amendment application be approved, the applicant will be required to receive Site Plan Approval prior to the issuance of a building permit and commencement of any development. Detailed site plan drawings addressing such matters as access, site design (including parking, pedestrian circulation, accessibility, fire truck

Background

access and waste disposal), lot grading and drainage, lighting and landscaping will be required to be submitted for review and approval. The applicant will also be required to enter into a site plan agreement with the Town and provide securities to guarantee the completion of works in accordance with the approved drawings.

Discussion

Public Consultation and Review Process

Notice of a complete application was provided on February 26, 2021. Notice for the statutory public meeting was provided pursuant to the requirements of the Planning Act and the Town's Official Plan via written notice to all properties within 200 metres of the subject lands, as well as an ad in the Milton Canadian Champion Newspaper on June 24, 2021. The statutory public meeting was held on July 19, 2021 and no members of the public spoke at the meeting. Staff did receive one written submission from the planning consultants on behalf of the adjacent landowner, Mil Con Three Developments Limited (Fieldgate Developments), acknowledging that Boyne Urban Development Inc. would require their participation in securing a purchase and sale agreement to facilitate the sale of the residential reserve lands that would allow the proposed townhouse development to proceed. The correspondence is attached as Appendix 2 to this report.

Agency Consultation

The proposed Zoning By-law Amendment and all supportive documents were circulated to both internal and external commenting agencies. Halton Region, Town Departments, School Boards and other agencies offered no objection to the application. Agencies will continue to work with the applicants through the Site Plan Approval process prior to the development of the site.

Summary of Issues

Availability of Infrastructure and Access to the Subject Lands

In the early stages of review of the subject application, timing of ultimate servicing connections, construction of surrounding streets and the ability to provide direct access to the future Hickory Crescent (i.e. due to a small residential reserve situated between the original two lots and the future Hickory Crescent) were unknown, as these elements were fully dependant upon registration of the Mil Con Three subdivision located to the north and

Discussion

west and construction of the necessary infrastructure associated with that plan. To advance the development of the subject lands, the applicant proceeded to apply for a consent application that would allow for the extension of necessary services from the existing Mattamy subdivision to the north and east of the subject lands.

As the review of both applications progressed, timing became more aligned and the aforementioned severance was no longer required. Through the draft plan conditions for the Mil Con Three subdivision, staff required that the residential reserve be acquired by BUDI or conveyed to the Town so that direct access from the BUDI development could be achieved. Upon registration of the Mil Con Three subdivision, anticipated before the end of the year, the residential reserve will be conveyed, the necessary servicing and road infrastructure will be provided, and the proposed development will be able to proceed following site plan approval and building permit issuance.

Amending Zoning By-law

In order to permit the proposed development, a zoning bylaw amendment containing a Residential Medium Density II (RMD2) Zone classification with site-specific provisions is required.

Residential Medium Density II (RMD2) Site-Specific Zone

In absence of general condominium provisions in the zoning by-law, planning and zoning staff must establish appropriate standards based on development principles that are acceptable to the Town for a proposed development. As a result, a portion of the amending by-law associated with the subject application (attached as Appendix 1 to this report) provides a specific description of the lot being developed and provides the minimum setbacks from each property line, based on provisions applicable to similar built form, to establish the development envelope. In addition, the by-law recognizes items that are specific to the development proposal including the addition of stacked townhouse dwelling units (they are defined but not listed as a separate use in the RMD2 Zone) and minor variations to existing zoning provisions relating to minimum off-street parking requirements, setbacks from parking areas and underground parking structures to lot lines, maximum widths of exclusive use driveways, and the minimum amount of landscape open space to be provided. Provisions that apply to the RMD2 Zone but are not applicable to the type of built form proposed, have also been noted. Since the site plan is still being refined, staff has also provided minimal flexibility in the by-law to allow for minor alterations at the next stage.



Discussion

With respect to the proposed reduction in parking, it should be noted that the Town's Zoning By-law 016-2014, as amended, does not provide a specific provision relating to condominium multiple dwellings or stacked townhouses, and as a result, the by-law defaults to an 'all other dwelling unit' category that requires a parking rate similar to privately owned grade related product (i.e. two parking spaces per unit). Given that the subject lands are located along an intensification corridor where transit will be prevalent, the proposal offers a mixture of dwelling unit types and sizes, and parking arrangements that assist in making housing more affordable, and all required visitor parking has been provided, staff is satisfied that the proposed resident parking rate of 1.42 parking spaces per unit is appropriate for the site. To further support the slight reduction, the development offers a number of Travel Demand Management (TDM) measures to meet objectives and targets to reduce vehicular demand and encourage passenger, transit, cycling, and walking including horizontal bicycle hangers for each underground parking space and garage unit, better sidewalk connectivity, and unbundled parking options (i.e. separated cost of parking space from cost of resident units) that allow residents to consider alternative modes of travel.

Conclusion

Planning staff is of the opinion that the proposed 64 dwelling unit (i.e. a combination of stacked townhouse and multiple dwelling units) subject to site-specific provisions, is consistent with the Provincial Policy Statement, conforms to provincial, regional and local planning policy, and achieves acceptable engineering and design standards. On the basis of the foregoing, staff recommends that the Zoning By-law Amendment attached as Appendix 1, be brought forward for Council adoption.

Financial Impact

None arising from this report.

Respectfully submitted,

Jill Hogan
Commissioner, Development Services

For questions, please contact: Angela Janzen, Sr. Planner Phone: Ext. 2310



Attachments

Figure 1 - Location Map

Figure 2 - Site Plan

Figure 3 - Floor Plans & Underground Parking Plan

Figure 4 - Building Elevations & Renderings

Appendix 1 - Draft Zoning By-law Amendment

Appendix 2: Public Comments

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

FIGURE 1 LOCATION MAP



Council Meeting Date:
December 18th, 2023

Scale: 1: 2,500

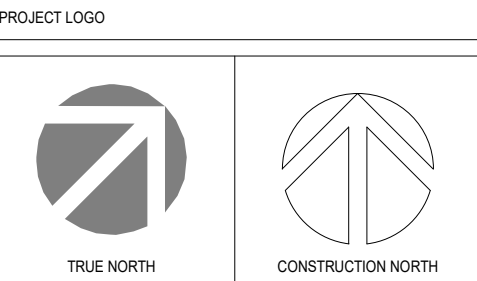
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Development Services Department



Subject Property
Page 217 of 365

FIGURE 2 DS-065-23



KEY PLAN

- PROPERTY LINE
- - - EXISTING STRUCTURE TO BE DEMOLISHED
- ▨ LANDSCAPED AREA
- ▨ PERMEABLE PAVERS
- ▨ PROPOSED BUILDING
- ▨ DAYLIGHT TRIANGLE
- EX HP EXISTING HYDRO POLE
- EX TJB EXISTING TELEPHONE JUNCTION BOX
- EX PED EXISTING TELEPHONE PEDESTAL
- ← TRAFFIC DIRECTION ARROWS
- VISITORS PARKING SPACE

NO.	DESCRIPTION	DATE
7	REVISED PER RE-ZONING COMMENTS	2023/11/21
6	REVISED PER RE-ZONING COMMENTS	2023/10/03
5	REVISED PER RE-ZONING COMMENTS	2023/10/08
4	ISSUED FOR SWEEP-PATH ANALYSIS	2023/12/22
3	RE-ISSUED FOR ZBA	2023/11/29
2	ISSUED FOR ZBA	2023/11/23
1	TOWN ISSUANCE	2023/11/29

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PROJECT:
BOYNE URBAN BRITANNIA ROAD

8671 - 8751 BRITANNIA ROAD, MILTON

DRAWING TITLE:
SITE PLAN

DRAWN BY: AM DATE: 09/06/23
CHECKED BY: AA SCALE: AS NOTED

PROJECT NO: **19018**

DRAWING NO: **A100**

OVERALL DEVELOPMENT STATISTICS

LOT AREA: 8,085 M2 (0.8 HA)
BUILDING FOOTPRINT: 3,145 M2
LOT COVERAGE: 38.8%
DENSITY: 81.56 UNITS / HA
GROSS FLOOR AREA: 12,559 M2
(INCL. UNDERGROUND PARKING)
LANDSCAPED AREA: 2,383 M2 (29.5%)
NUMBER OF UNITS: 64
NUMBER OF PARKING SPACES: 110

GENERAL NOTES:

- DRAWINGS & SPECIFICATIONS OF ALL DISCIPLINES TO BE READ TOGETHER. ANY NOTE, DRAWING, OR DETAIL SHOWN OR SPECIFIED IN ONE DISCIPLINE IS APPLICABLE TO ALL DISCIPLINES.
- SURVEY INFORMATION TAKEN FROM J.D. BARNES LIMITED ONTARIO LAND SURVEY DATED APRIL 14, 2020
 - HICKORY CRES. INFORMATION TAKEN FROM DRAFT PLAN OF SUBDIVISION MIL CON THREE DEVELOPMENTS LTD. FIELDGATE DEVELOPMENTS (EAST LANDS) BY GLEN SCHNARR & ASSOCIATES INC. DATED JANUARY 8, 2020
 - KENNEDY CIRCLE AND BRITANNIA ROAD RECONSTRUCTION INFORMATION TAKEN FROM BRITANNIA ROAD RECONSTRUCTION HALTON REGION 8671 BRITANNIA ROAD PROPERTY REQUEST PLAN BY JACOBS DATED OCT. 18, 2019

GENERAL SITE NOTES

2
A100

Description	Ref.	RMD2 Zoning Required	Proposed	Complies
Permitted Uses	6.1 Table	Apartment Building, townhouse dwelling, back to back townhouse, multiple dwelling, retirement dwelling, quadruple dwelling, shared housing, short-term rental	Multiple Dwelling and Stacked Townhouse	No
Lot Frontage Min. (Dwelling, Multiple)	6.2 - Table 6D	30 m	80.49m	Yes
Lot Depth Min. (Rickey Cres.)	6.2 - Table 6D	35 m	97.85m	Yes
Min. Front Yard (Rickey Cres.)	6.2 - Table 6D	4 m	3m	No
Min. Interior Side Yard	6.2 - Table 6D	6 m	1.2m	No
Min. Exterior Side Yard (Kennedy Circle)	6.2 - Table 6D	4 m	2m	No
Min. Rear Yard (Britannia Road)	6.2 - Table 6D	7.5 m	3m	No
Max. Building Height	6.2 - Table 6D	4 storeys, 16.5 m	11.43 m	Yes
Landscaped Open Space Min.	6.2 - Table 6D	35%	N/A	No
Air Conditioners and Heat Pumps (Ground Level)	Table 4E	Permitted in interior side yard and rear yard with minimum setbacks	N/A, located on rooftop or mechanical penthouse	Yes
Roof-Mounted HVAC	4.6.2	Shall be screened from any public street	On rooftop patio screened or mechanical penthouse	Yes
Balconies	4.5.8 Table 4H	Permitted in the rear yard, exterior side yard, or front yard. May be permitted to encroach to a maximum of 1.5 m into a required yard, if located on a lot in a parish, shall be permitted to encroach to the same extent.	Balconies in rear yard of Britannia Road. None proposed on the building footprint.	Yes
Porch or Verandas (including stairs)	Table 4H	Shall be permitted in any yard; no closer than 3.0 m to a rear lot line and 1.0 m to any other lot line.	None proposed	Yes
Bay or Boved Window Encroachments	Table 4H	Bay or boved windows may encroach into a required exterior side yard, front yard, or rear yard up to a maximum of 0.6 m for a width of 1.5 to 3.0 m.	Boved windows encroach 0.5 m for a width of 3m.	Yes
Deck Encroachments	4.3.1 - Table 4D	Shall be less than 1.2 m above grade, permitted in the rear yard. Shall be located no closer to the side lot line than the proposed building and must be setback 3.0 m from the rear lot line but	No decks proposed	Yes

Description	Ref.	RMD2 Zoning Required	Proposed	Complies
Required Yards - Ornamental Projections	Table 4H	projections is 2.0 m above grade	None proposed	Yes
Encroachments into Required Yards - Stairs and Landings above grade	4.19.5 Table 4H	Stairs shall be located a minimum of 3.0 m from the property line, measured from the first floor, with no part of the landing closer than 1.5 m from the proposed building.	Stair to block D2 parking garage 1.7m to exterior side yard	Yes
Encroachments into Required Yards - Wheel Chair or Accessible Ramp	4.19.5 Table 4H	No Maximum	None proposed	Yes
Encroachments into Required Yards - Wheel Chair or Accessible Ramp (Utilities - Floor Area 10m2 or greater)	4.20.5.1 Table 4J	Permitted anywhere on a lot	None proposed	Yes
Daylighting - Local (Aerial)	5.10.1 Table 5I	15 m triangle (15 m curb radius & 400 m Intersection Spacing)	15m daylight triangle along Britannia	Yes
Daylighting - Local (Street Alikes - One Way)	5.7 Table 5C	5 m radius (8 m curb radius & 60 m Intersection Spacing)	5m visibility triangles along Hickory	Yes
Daylighting - Local (Street Alikes - Two Way)	5.7 Table 5C	6.0 m	N/A	Yes
Size Requirements of Off-Street Parking Spaces	5.8.0 Table 5D	Acute: 2.75 x 6.5 m Parallel: 2.75 x 6.5 m Diagonal: 2.75 x 5.8 m	Parallel: 2.75 x 6.5 m Diagonal: 2.75 x 5.8 m	Yes
Size Requirements of Off-Street Accessible Parking Spaces	5.8.0 Table 5D	Type A: 3.4 x 5.8 m Type B: 2.75 x 6.5 m Type C: 2.75 x 5.8 m	Type A & B provided with access aisle	Yes
Size Requirements of Off-Street Parking Spaces	5.8.0 Table 5D	0.6 m x 1.8 m and must provide a min. 1.9 m vertical clearance	Block A Single Garage & Driveway = 24 Block B Single Garage & Driveway = 22 Block C Single Garage = 11 Block D1 & D2	Yes
Residential Parking Requirements	5.8.1 Table 5E	Min. 2 parking spaces per unit plus 0.25 parking spaces for visitor parking Formula: (Residential) 6672 + 6542.25 +128 resident parking spaces and 16 visitor parking spaces	Block A Single Garage & Driveway = 24 Block B Single Garage & Driveway = 22 Block C Single Garage = 11 Block D1 & D2	Yes

Description	Ref.	RMD2 Zoning Required	Proposed	Complies
Min. Setback for Parking Structure Greater than 1.6 m in Height	5.14.2	parking structure is located no closer than 3.0m to a street line or lot line, but shall not encroach into a required landscape buffer	N/A	Yes
Min. Setback for Entrance and Exit Ramps	5.14.3	7.5 m from a streetline	Ramp 6.33m from street line when car exits	Yes
Stairs and Air Vents Associated with Parking Structures	5.14.4	Shall not be subject to the parking structure setbacks of this by-law	Yes	Yes

Definitions

Front Lot Line - [L] is the case of a corner lot, the shorter lot line abutting a street shall be deemed to be the front lot line and the longer lot line abutting the street shall be deemed to be the exterior side lot line. [L] means the lot line or intersection of the lot lines, opposite to, and most distant from, the front lot line.

Boyer Survey Secondary Plan

Description	Ref.	Residential Area Designation Required	Proposed	Complies
Permitted Uses	C.10.5.1.1	Apartment Building, stacked townhouses, townhouses, semi-detached dwellings, single detached dwellings, duplexes, triplexes, quadruplexes, similar grade related multiple attached housing, local institutional, and local commercial uses.	Duplex townhouse, single townhouse, stacked townhouse	Yes
Maximum Height	C.10.5.1.3	4 storeys	4 storeys	Yes
Minimum Permitted Density	C.10.5.1.1	45 uph	64 units / 7,847.244 sq m = 81.56uph	Yes
Maximum Permitted Density	C.10.5.1.1	100 uph	81.56uph	Yes

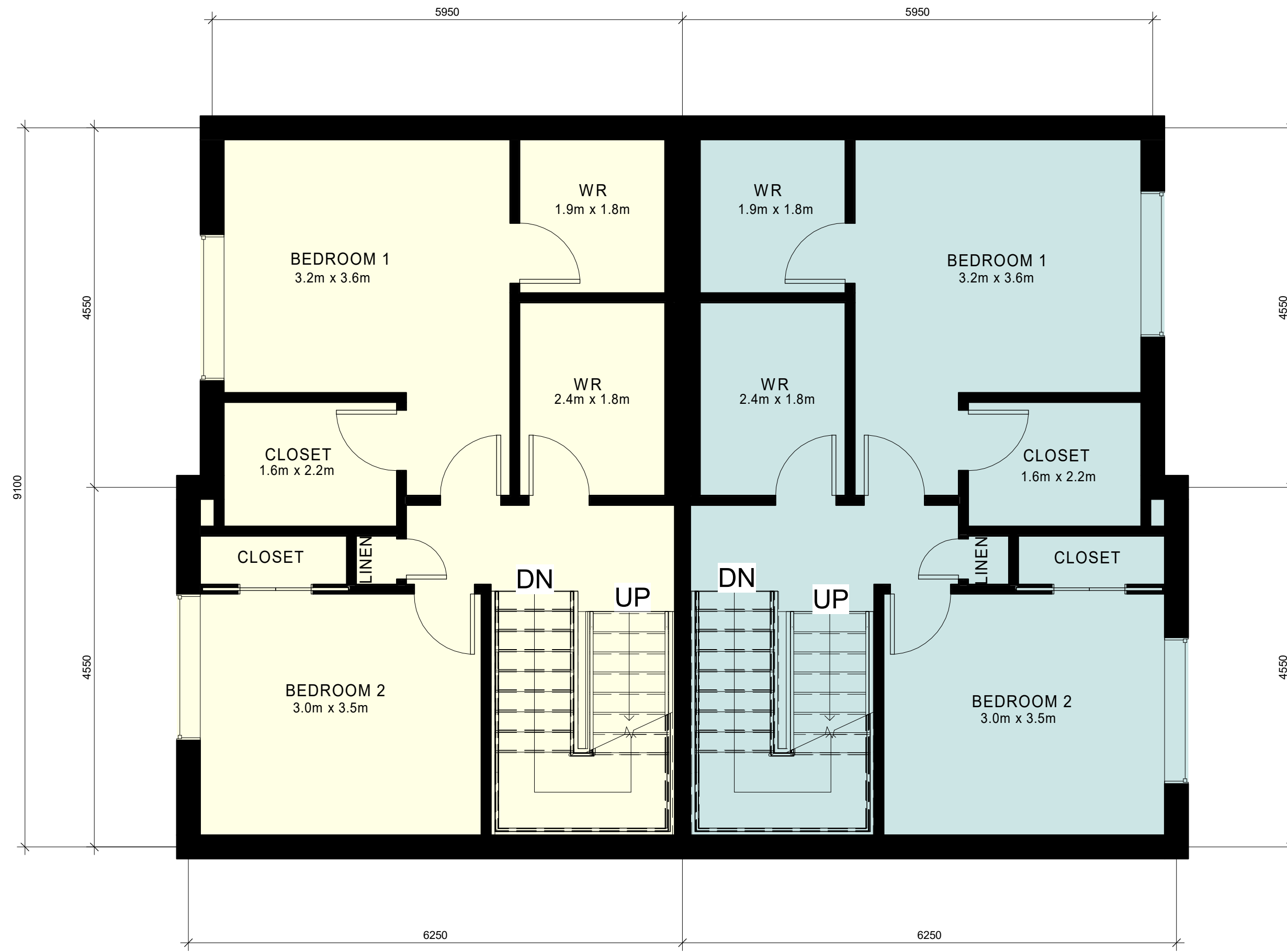
Milton Engineering Standards

Description	Ref.	Required	Proposed	Complies
Driveway - Pavement Width	ENG Standard 43	One-way: 4.2 m - 7.2 m Two-way: 7.2 m - 12 m	6m	Yes
Driveway - Curb Radius	ENG Standard 43	From a two-lane road: 8 m - 12 m From a four-lane road: 8 m - 12 m	6.1m	Yes

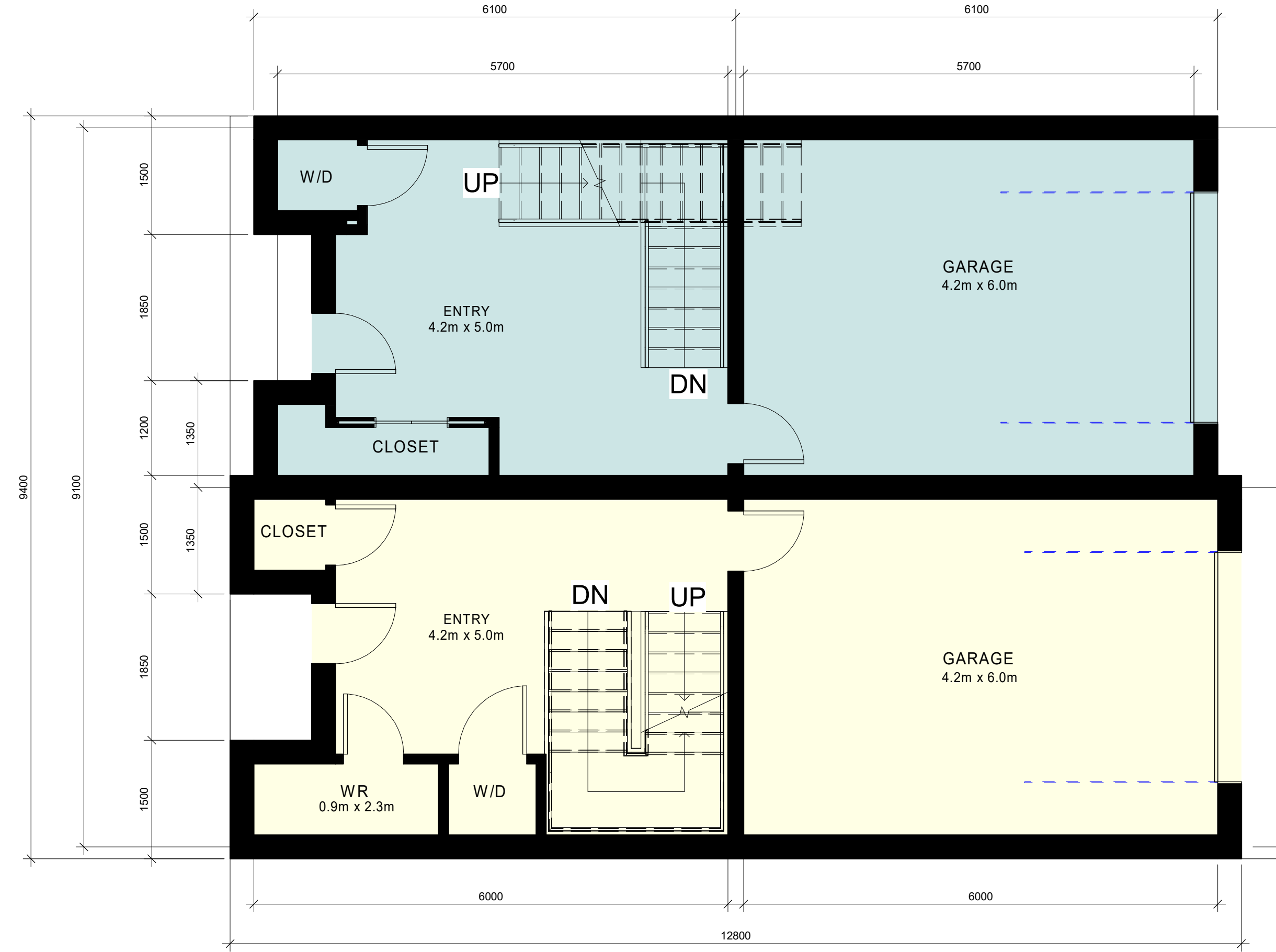
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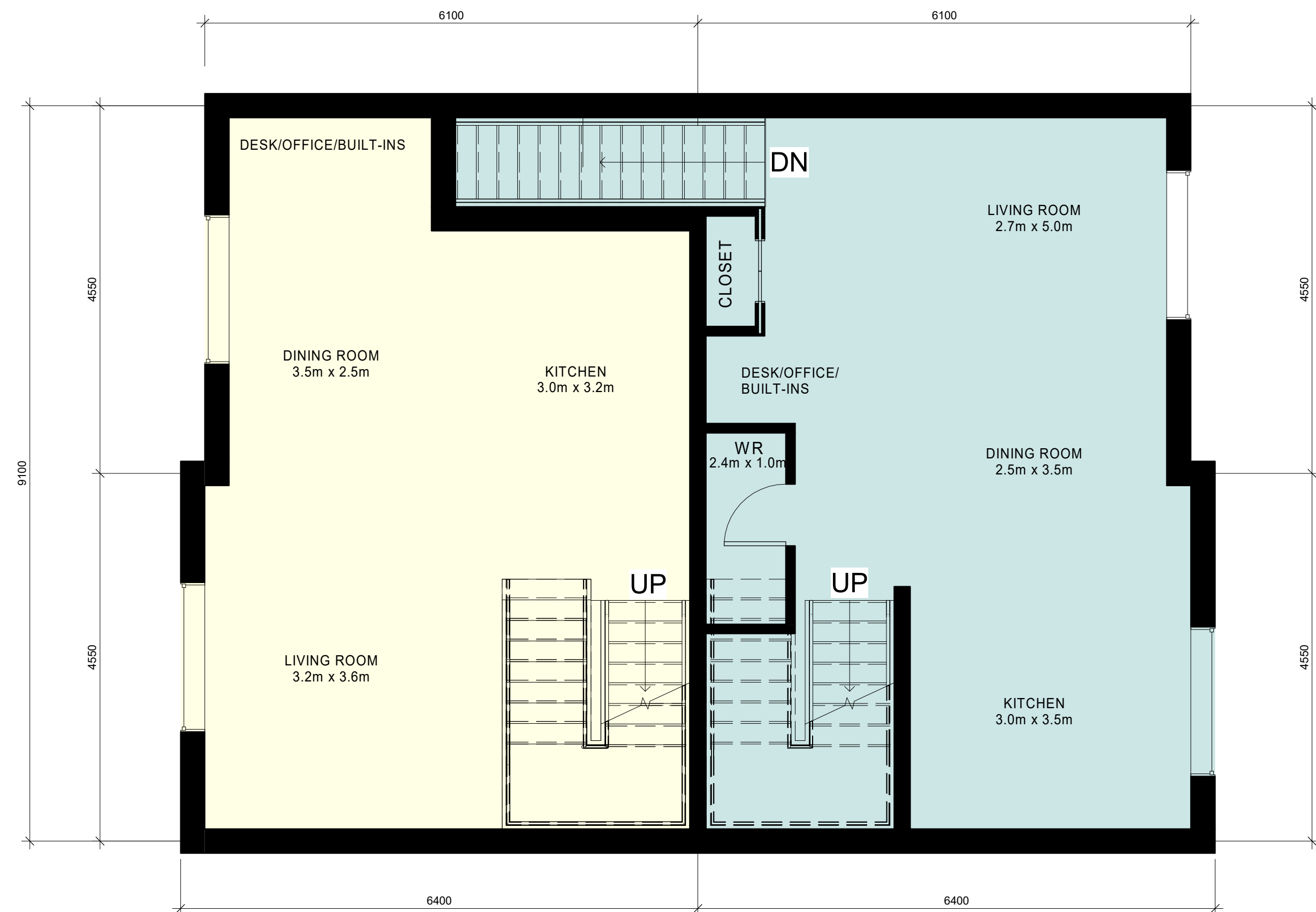
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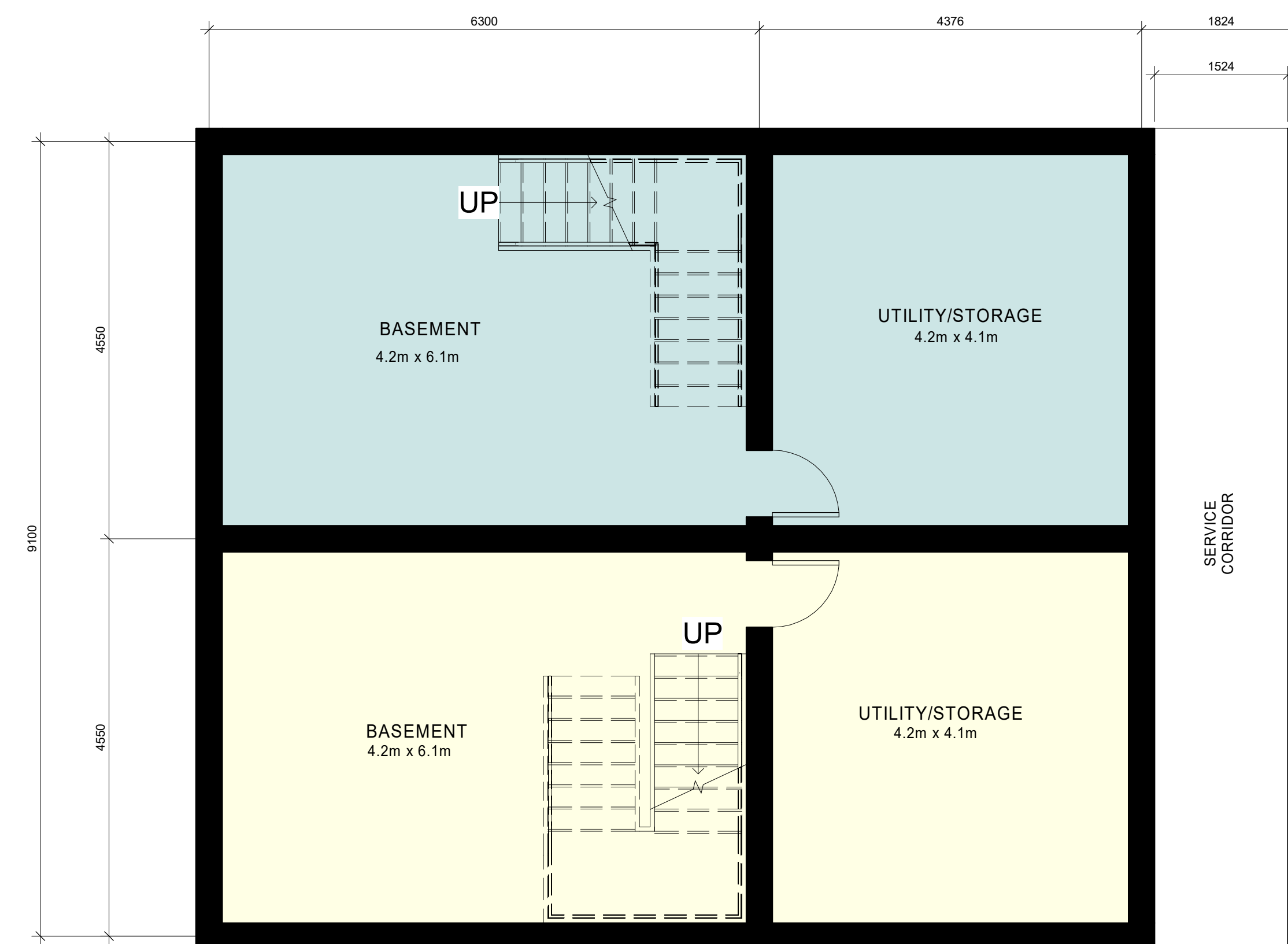
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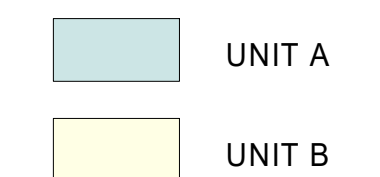
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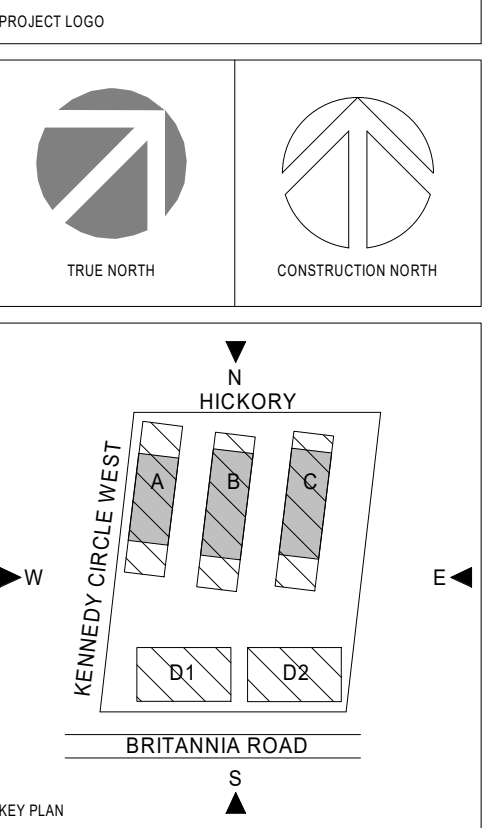
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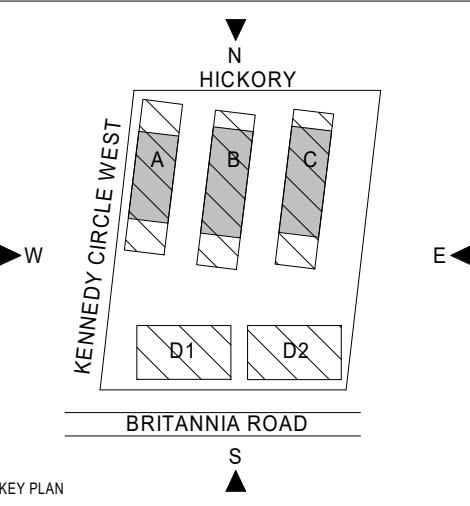
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PROJECT:

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A&B - FLOOR PLANS**

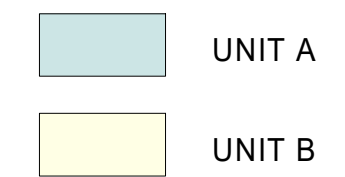
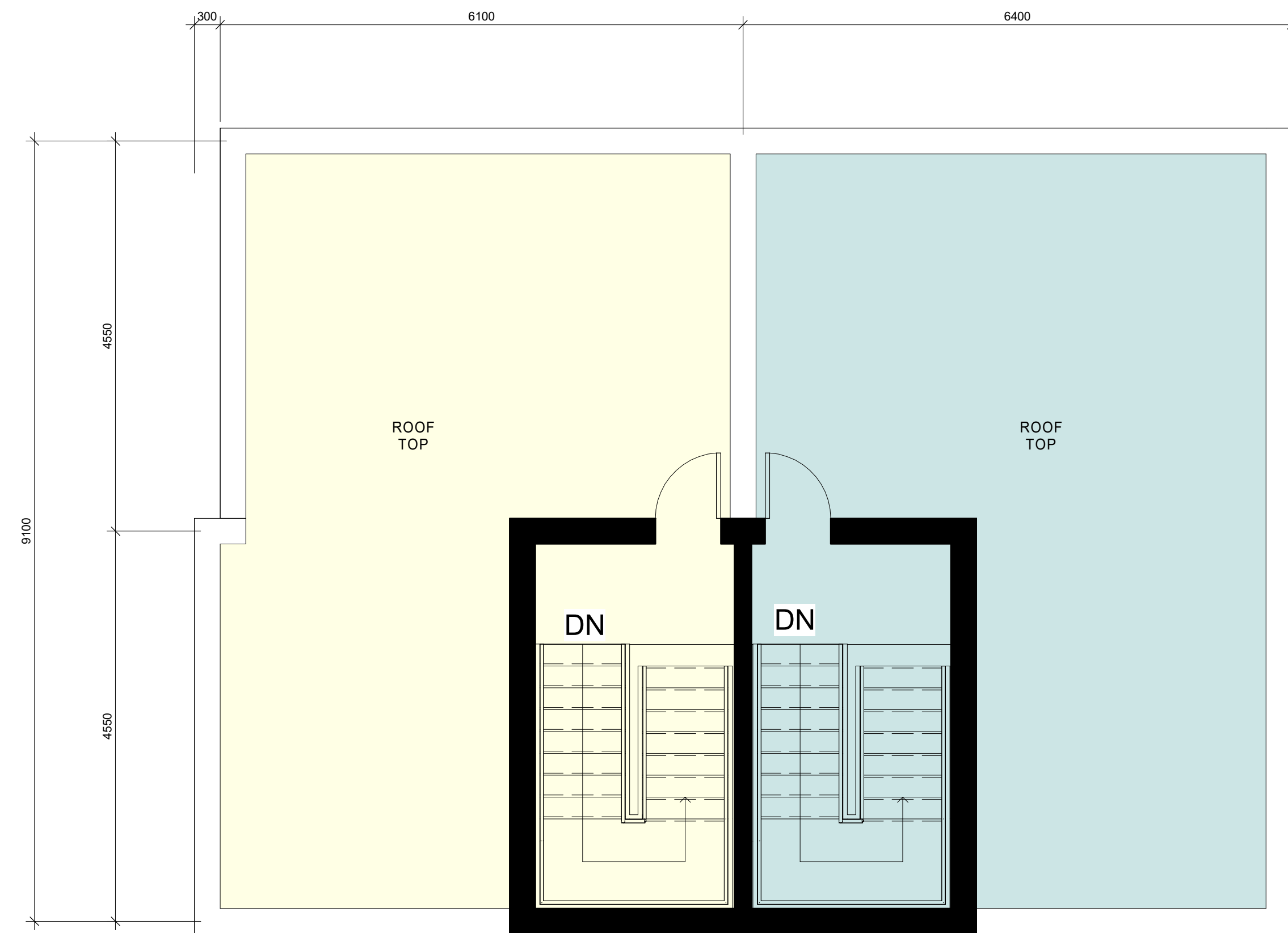
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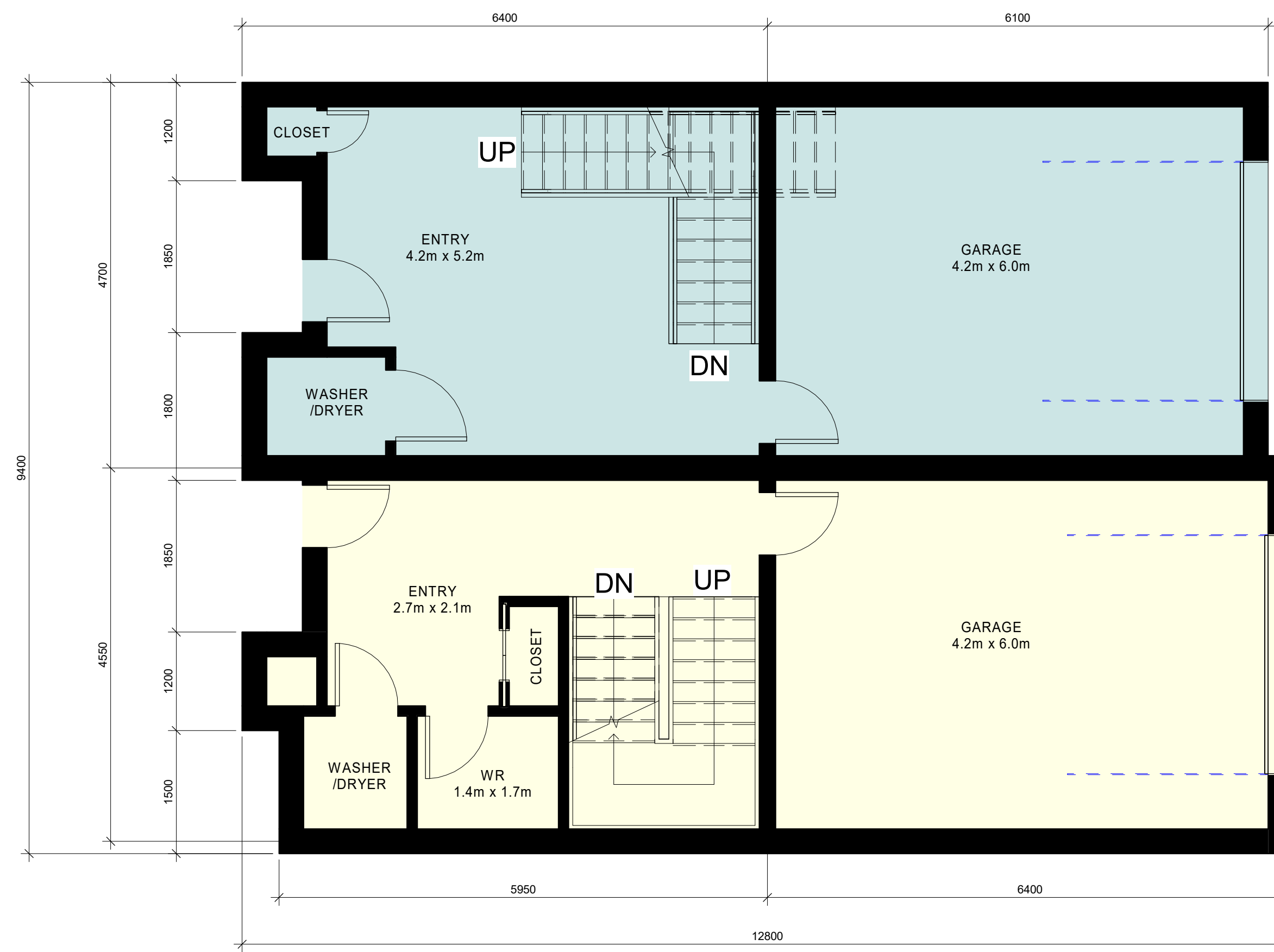


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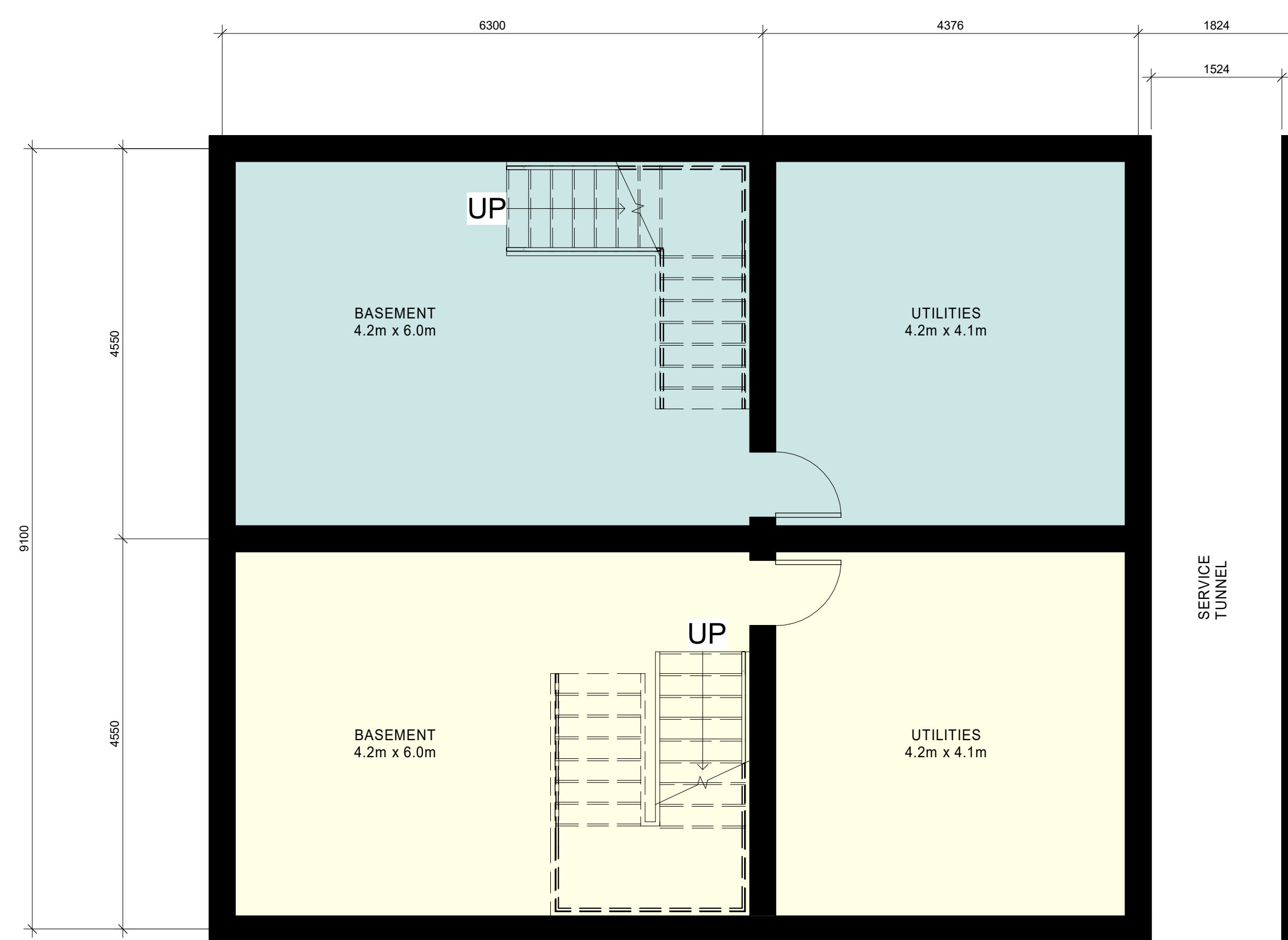
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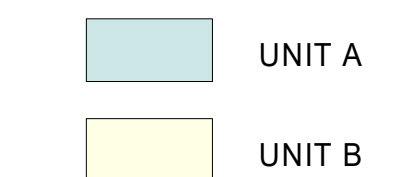
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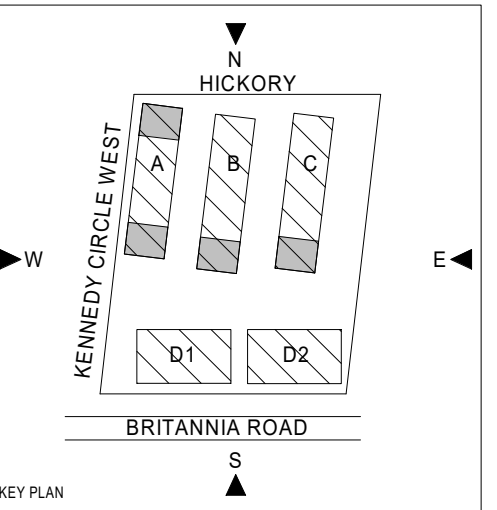
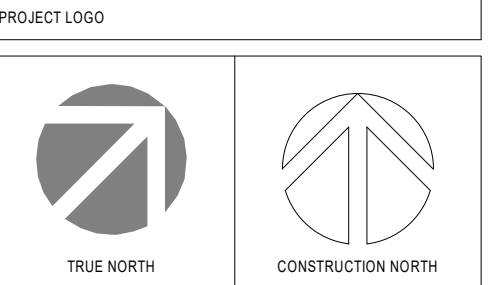
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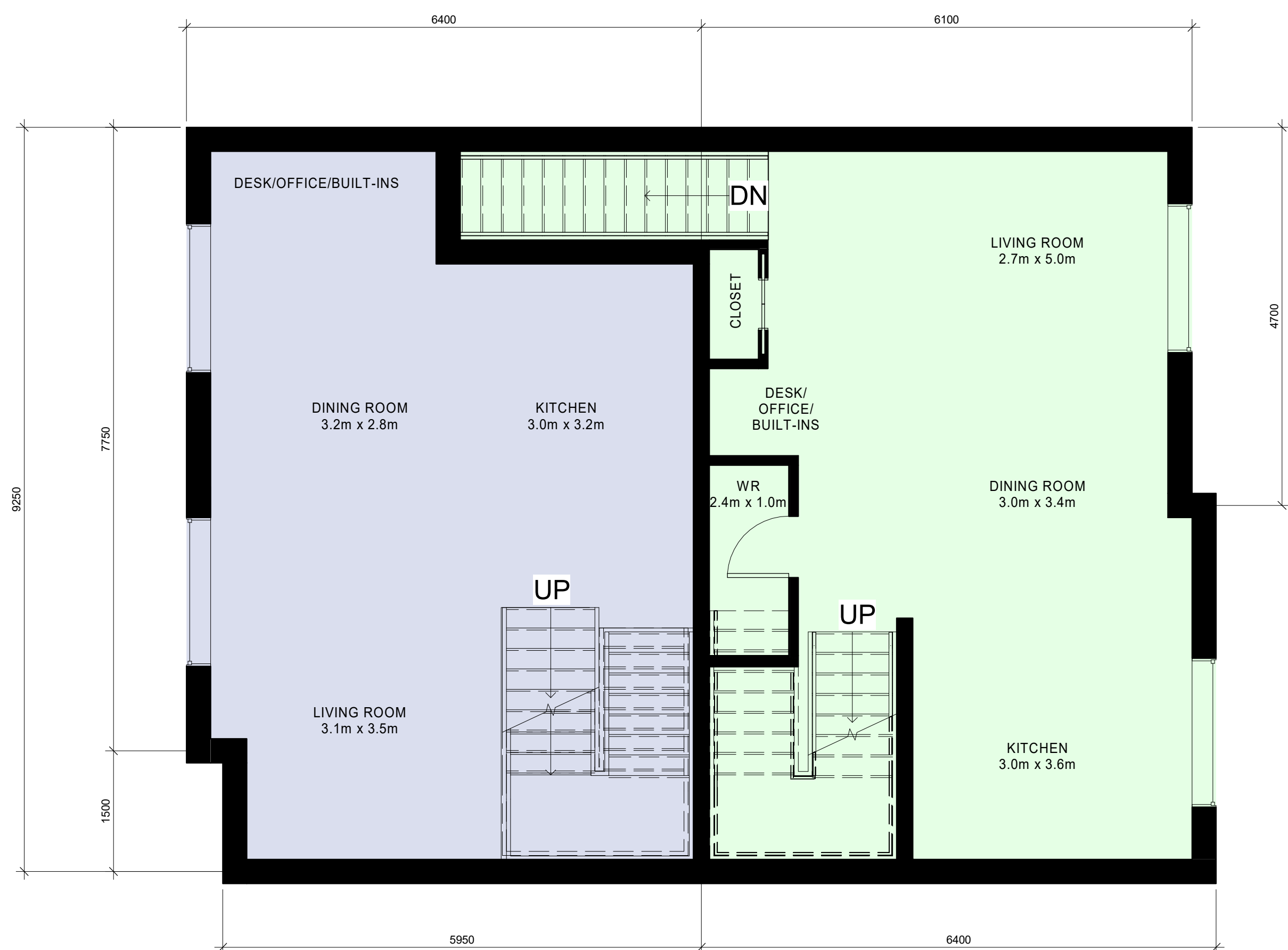
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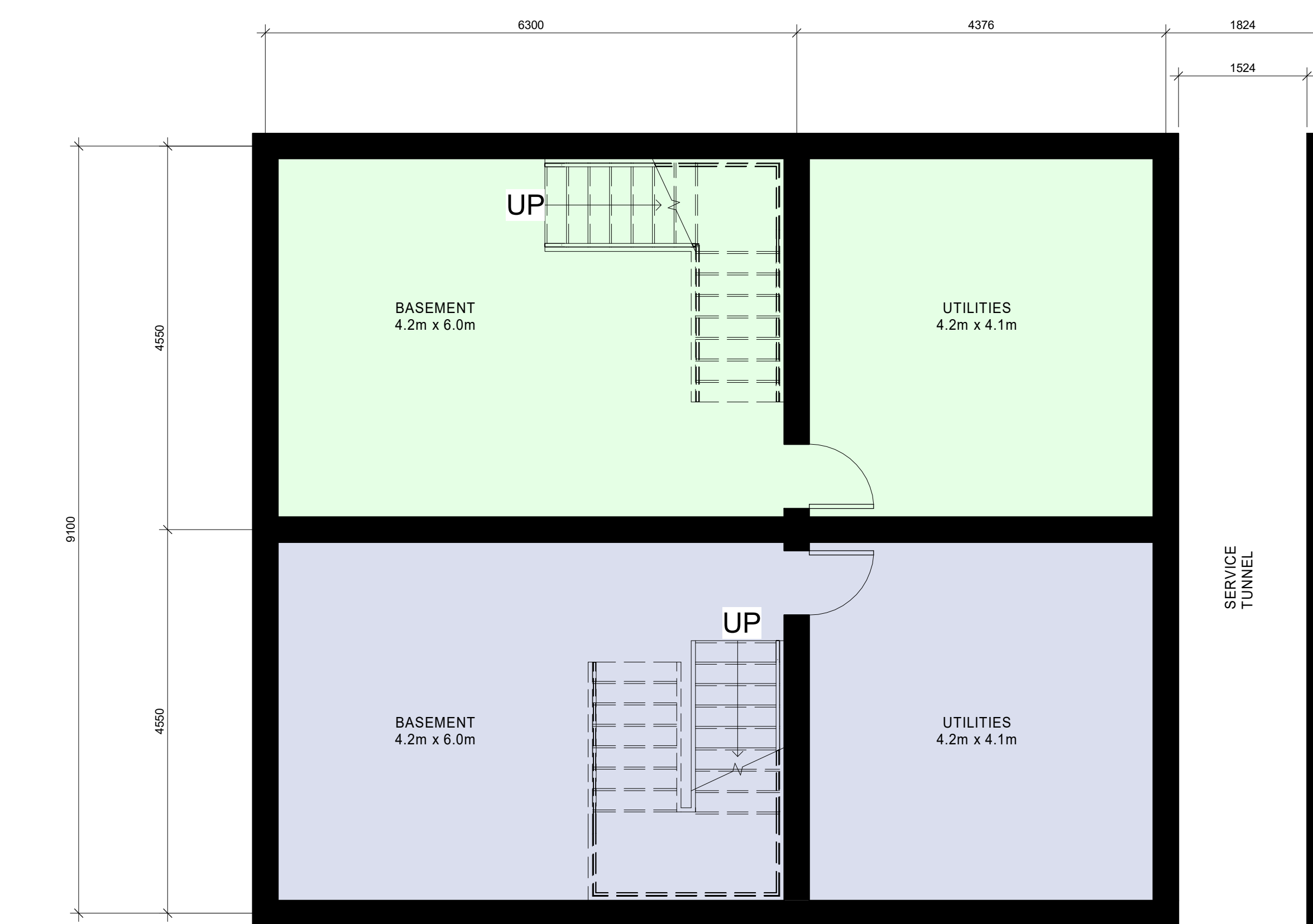
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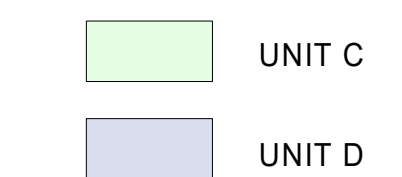
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LEVEL 2
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UNIT AREA LEGEND

PROJECT LOGO

TRUE NORTH CONSTRUCTION NORTH

KEY PLAN

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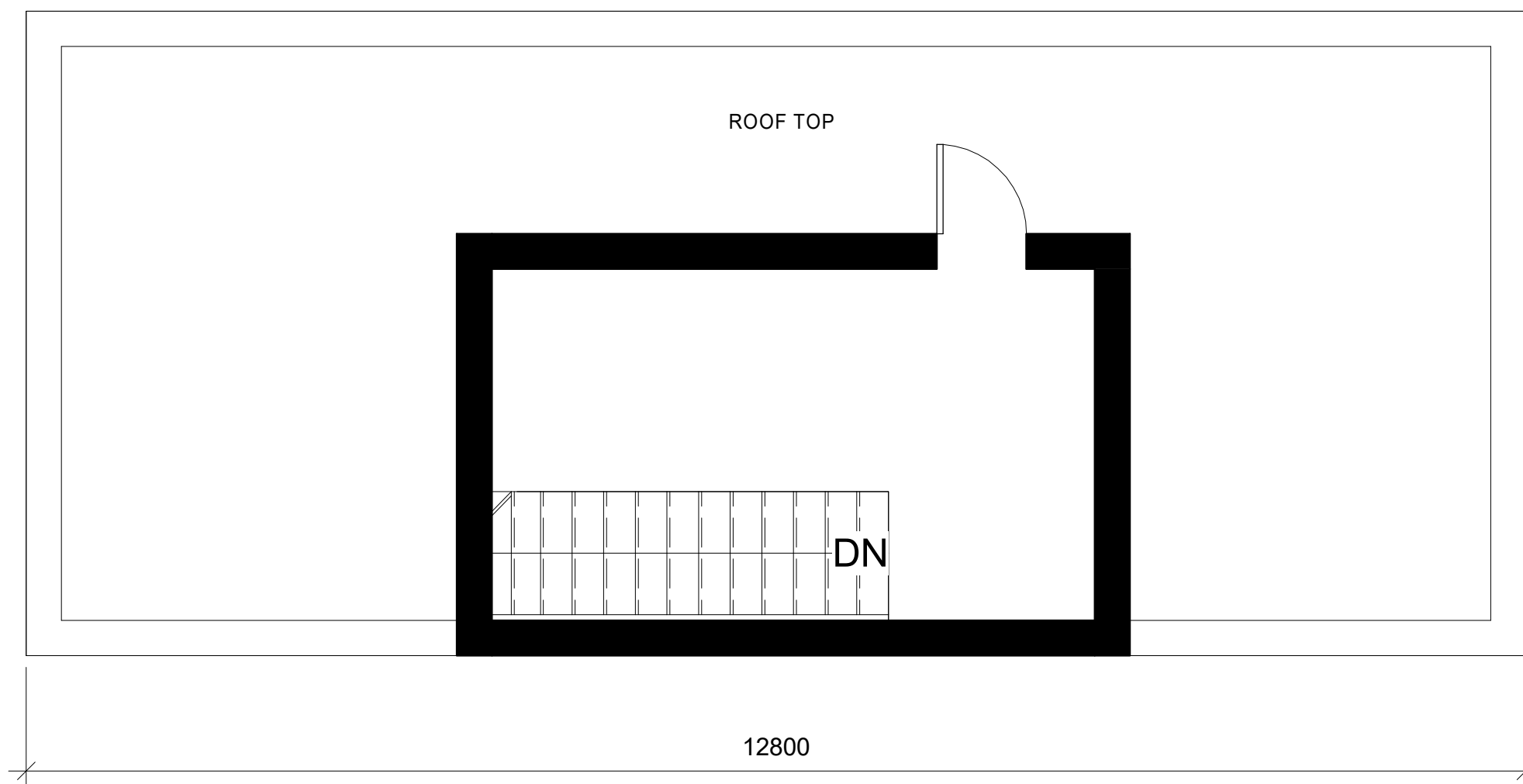
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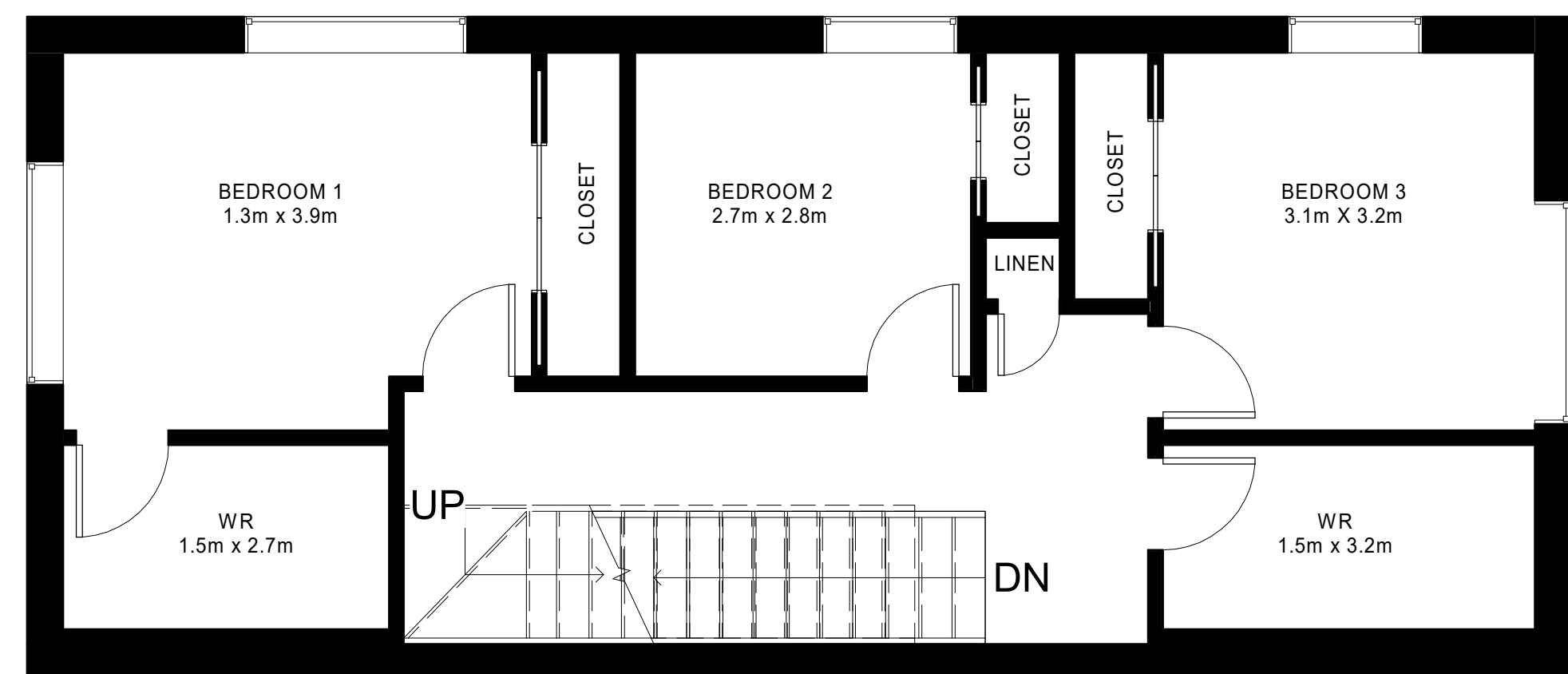
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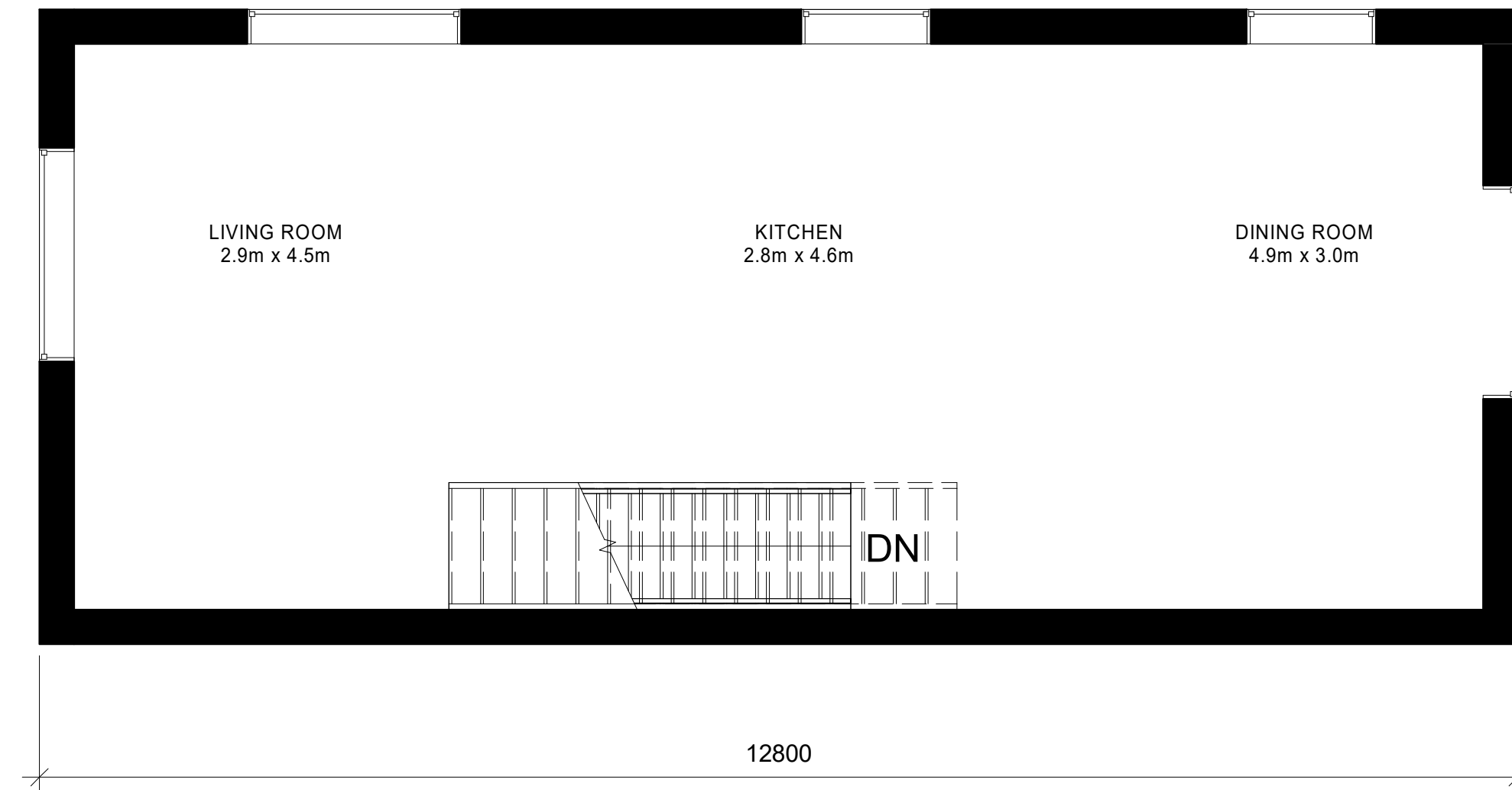
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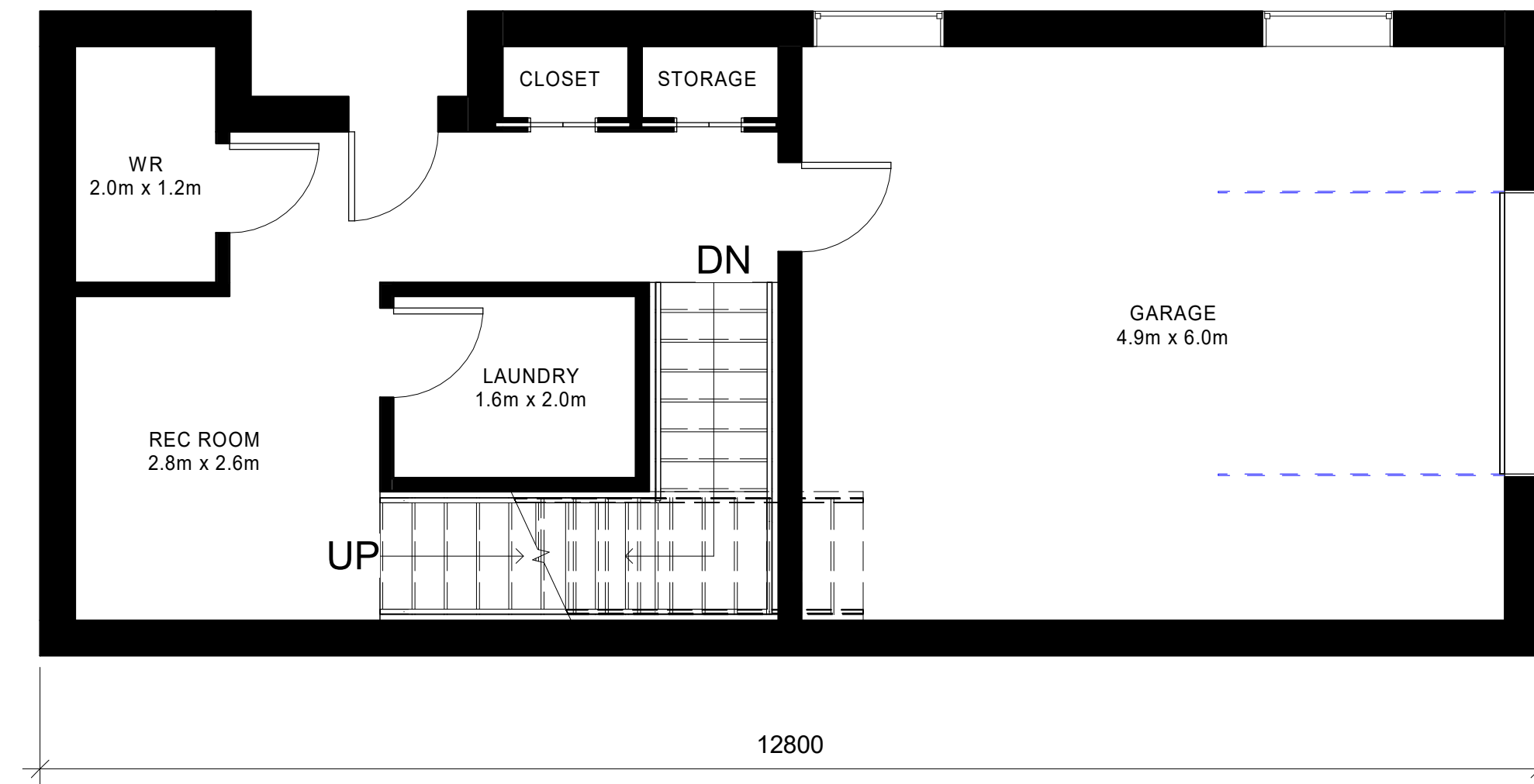
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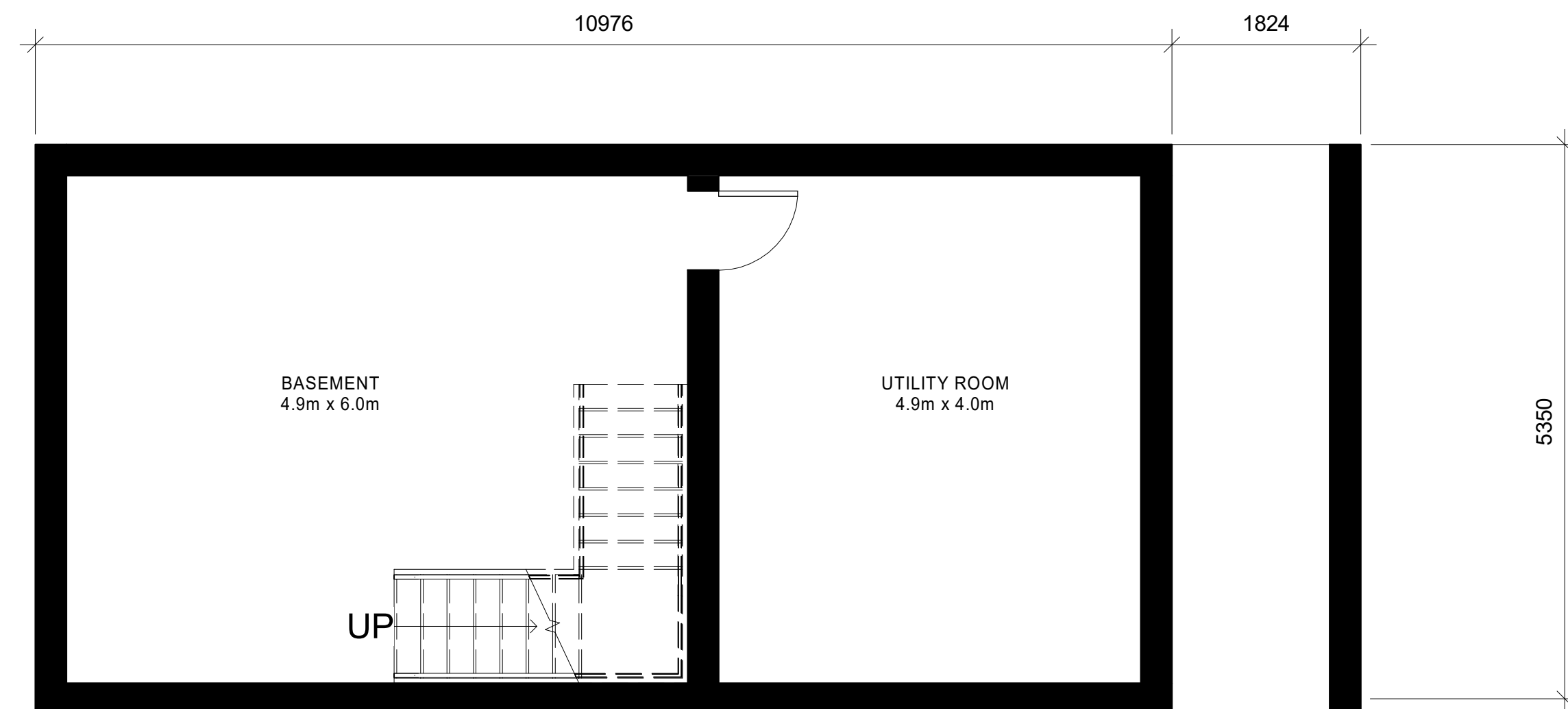
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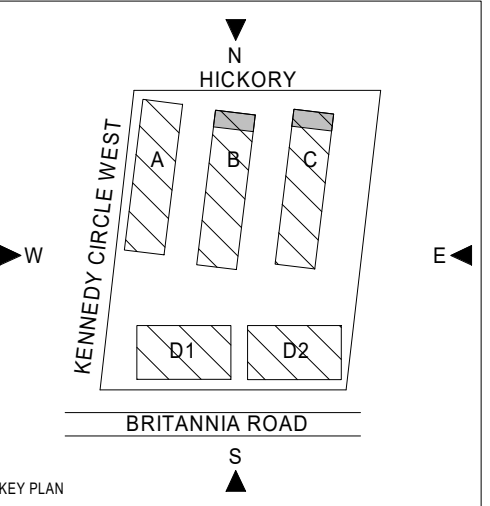
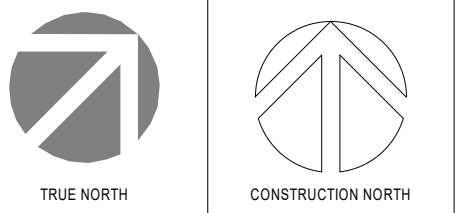


LEVEL 1 2
1:50 A5



BASEMENT 1
1:50 A5

PROJECT LOGO



1 ISSUED FOR ZBA 2020/11/13

No.	DESCRIPTION	DATE

DISCREPANCIES MUST BE REPORTED IMMEDIATELY TO THE ARCHITECT BEFORE PROCEEDING. ONLY FIGURED DIMENSIONS MUST BE USED. THE CONTRACTOR MUST CHECK THE DIMENSIONS ON SITE. THE DRAWING IS PROTECTED BY COPYRIGHT. ALL DIMENSIONS ARE SHOWN IN MILLIMETERS.

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Westinghouse HQ, 2nd Floor
286 Sanford Ave. N
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905.526.6700
www.mccallumsather.com

SEAL

CONSULTANTS

PROJECT:
BOYNE URBAN BRITANNIA ROAD

8671 - 8751 BRITANNIA ROAD, MILTON

DRAWING TITLE:
BUILDING B&C TOWNHOUSE - FLOOR PLANS

DRAWN BY: SW DATE: 2020/11/13

CHECKED BY: GD SCALE: 1:50

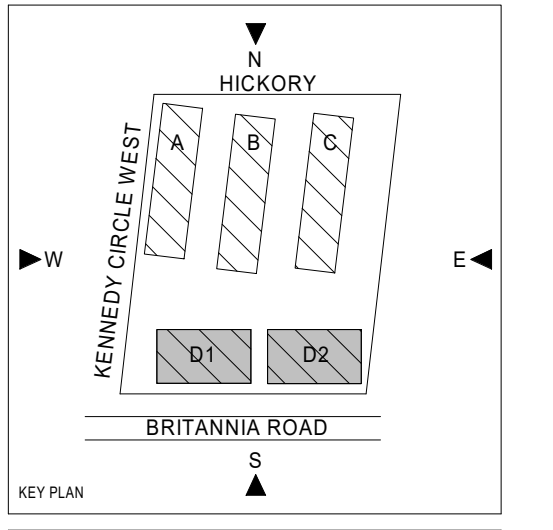
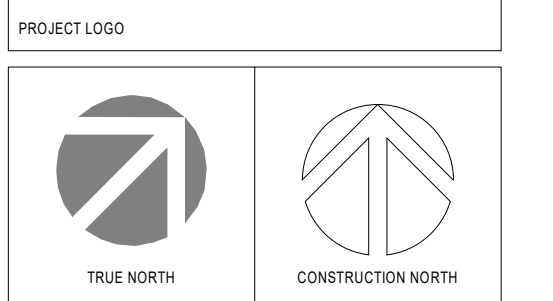
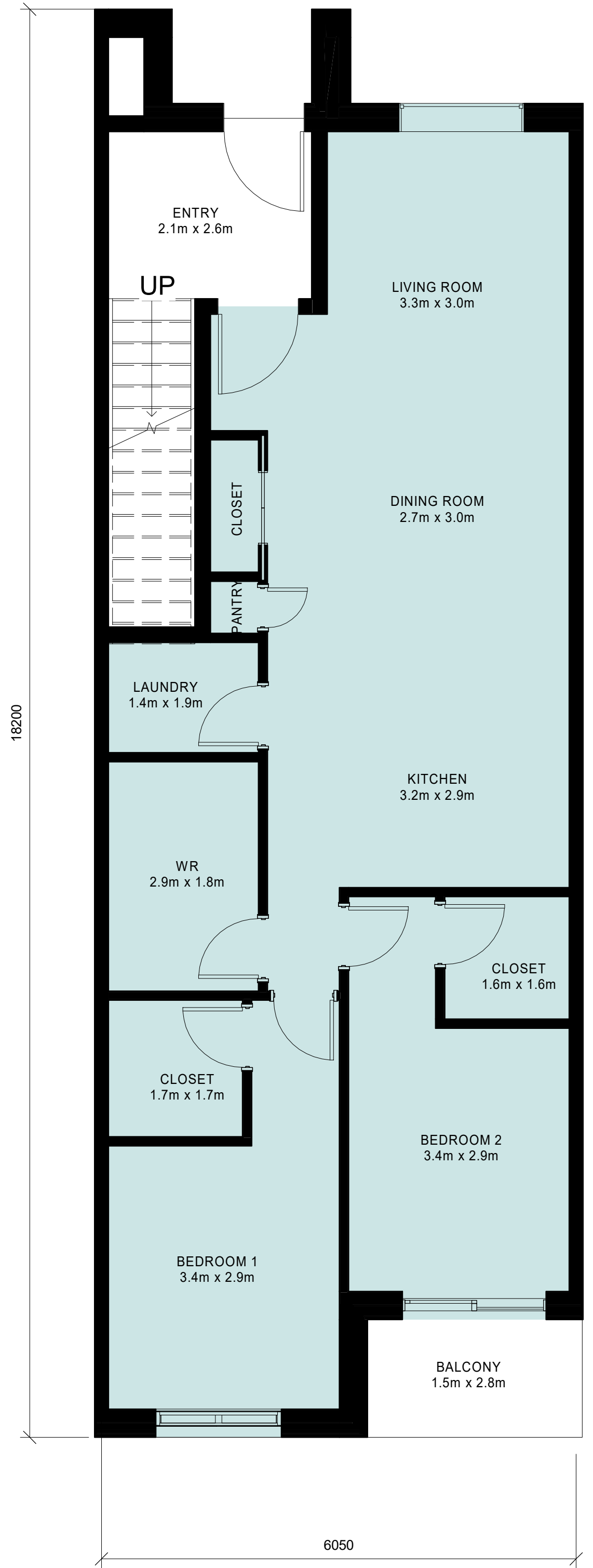
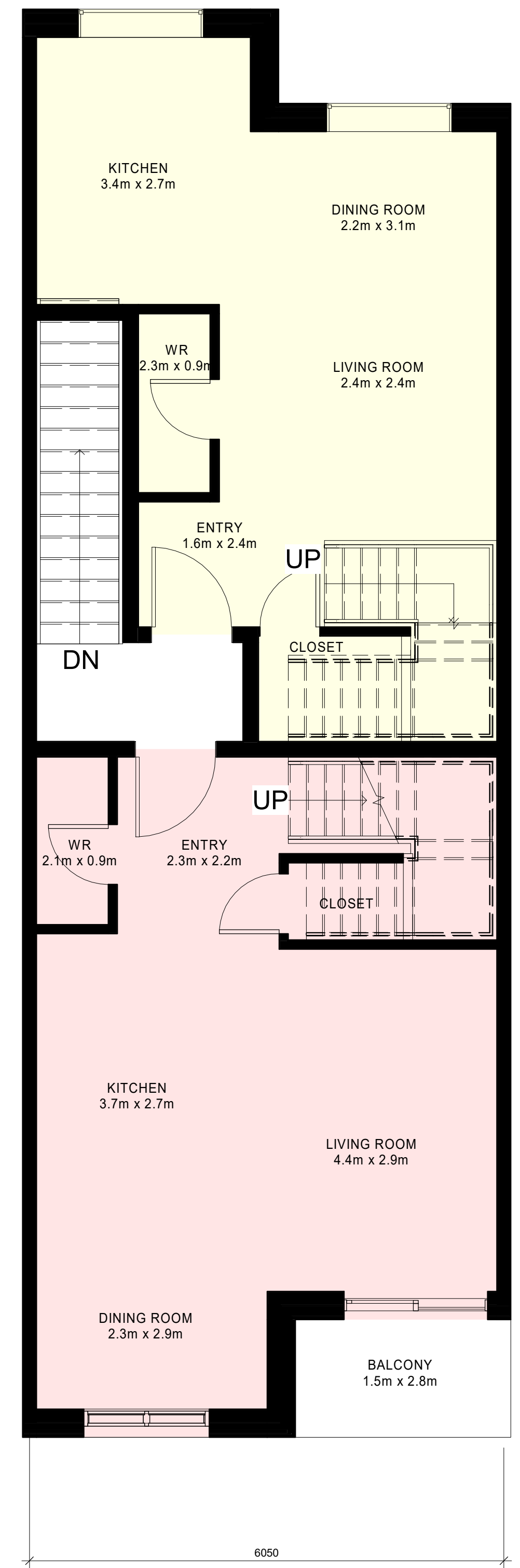
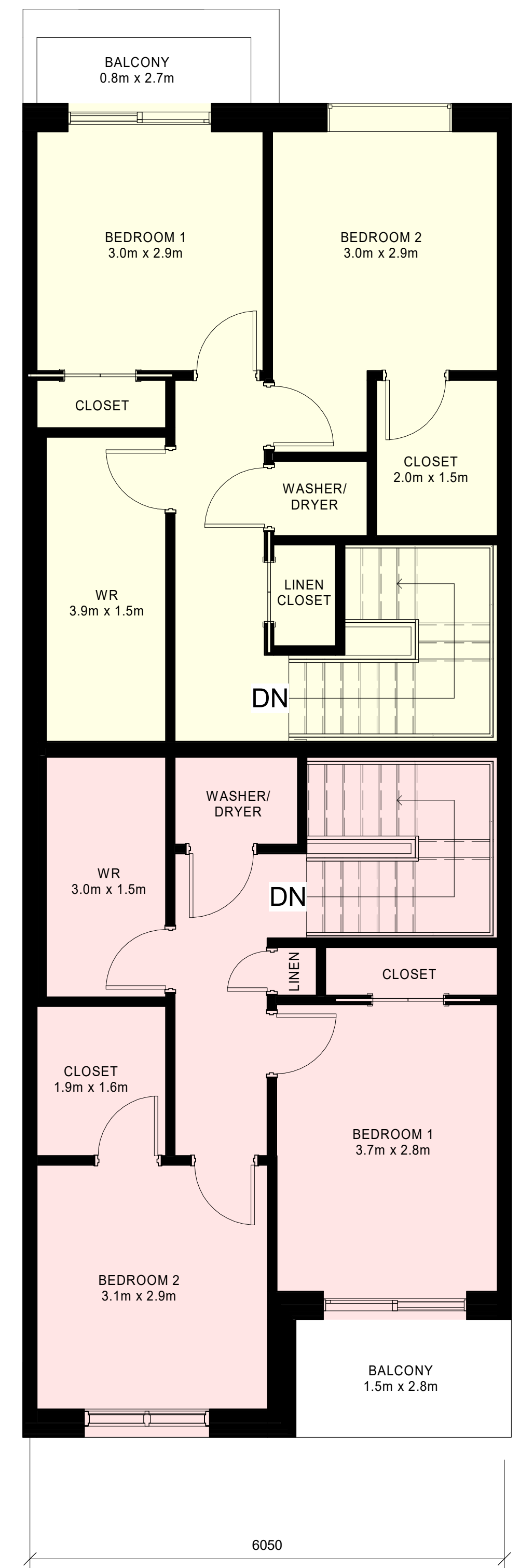
PROJECT NO: 19018

DRAWING NO:

A5

- UNIT A
- UNIT B
- UNIT C

UNIT AREA LEGEND



ISSUED FOR	DATE
1	2020/11/13

REVISIONS:

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PROJECT:
BOYNE URBAN BRITANNIA ROAD

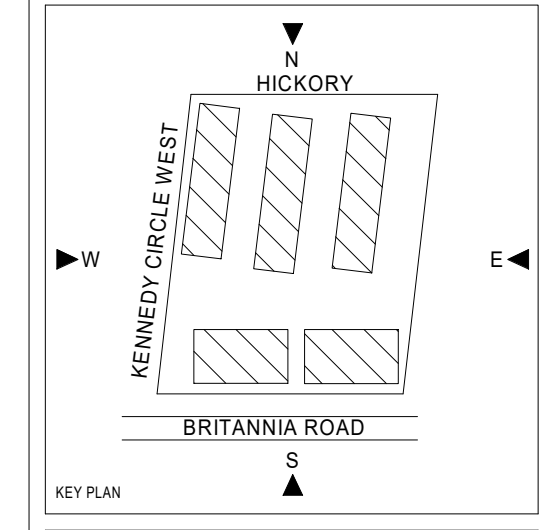
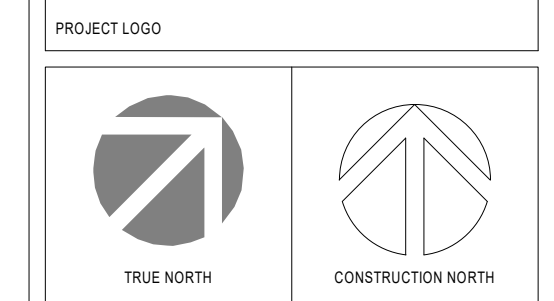
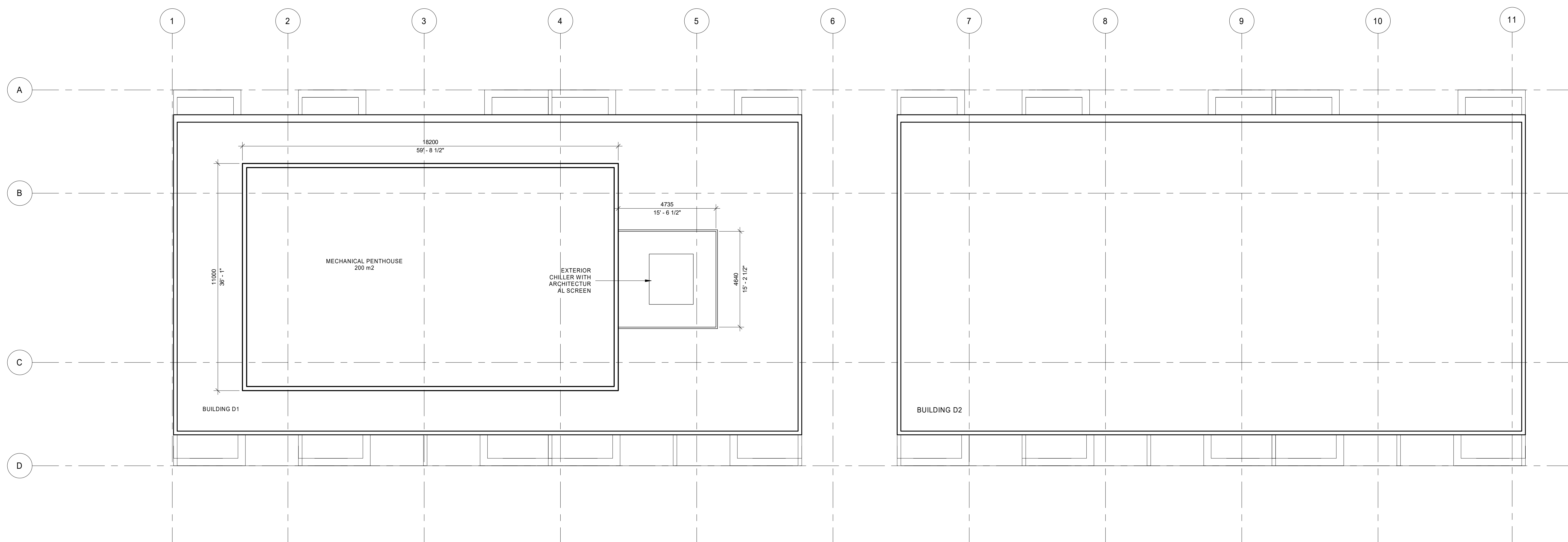
8671 - 8751 BRITANNIA ROAD,
MILTON

DRAWING TITLE:
BUILDING D1 & D2 STACKED TOWNHOUSE A,B&C - FLOOR PLANS

DRAWN BY:	SW	DATE:	2020/11/13
CHECKED BY:	GD	SCALE:	1:50

PROJECT NO: **19018**

DRAWING NO: **A6**



ISSUED FOR ZBA	2020/11/13	
No. 1	DESCRIPTION	DATE
REVISIONS:		
DISCREPANCIES MUST BE REPORTED IMMEDIATELY TO THE ARCHITECT BEFORE PROCEEDING. ONLY FIGURED DIMENSIONS MUST BE USED. THE CONTRACTOR MUST CHECK THE DIMENSIONS ON SITE. THE DRAWING IS PROTECTED BY COPYRIGHT. ALL DIMENSIONS ARE SHOWN IN MILLIMETERS.		
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CONSULTANTS:

PROJECT:
BOYNE URBAN BRITANNIA ROAD

8671 - 8751 BRITANNIA ROAD, MILTON

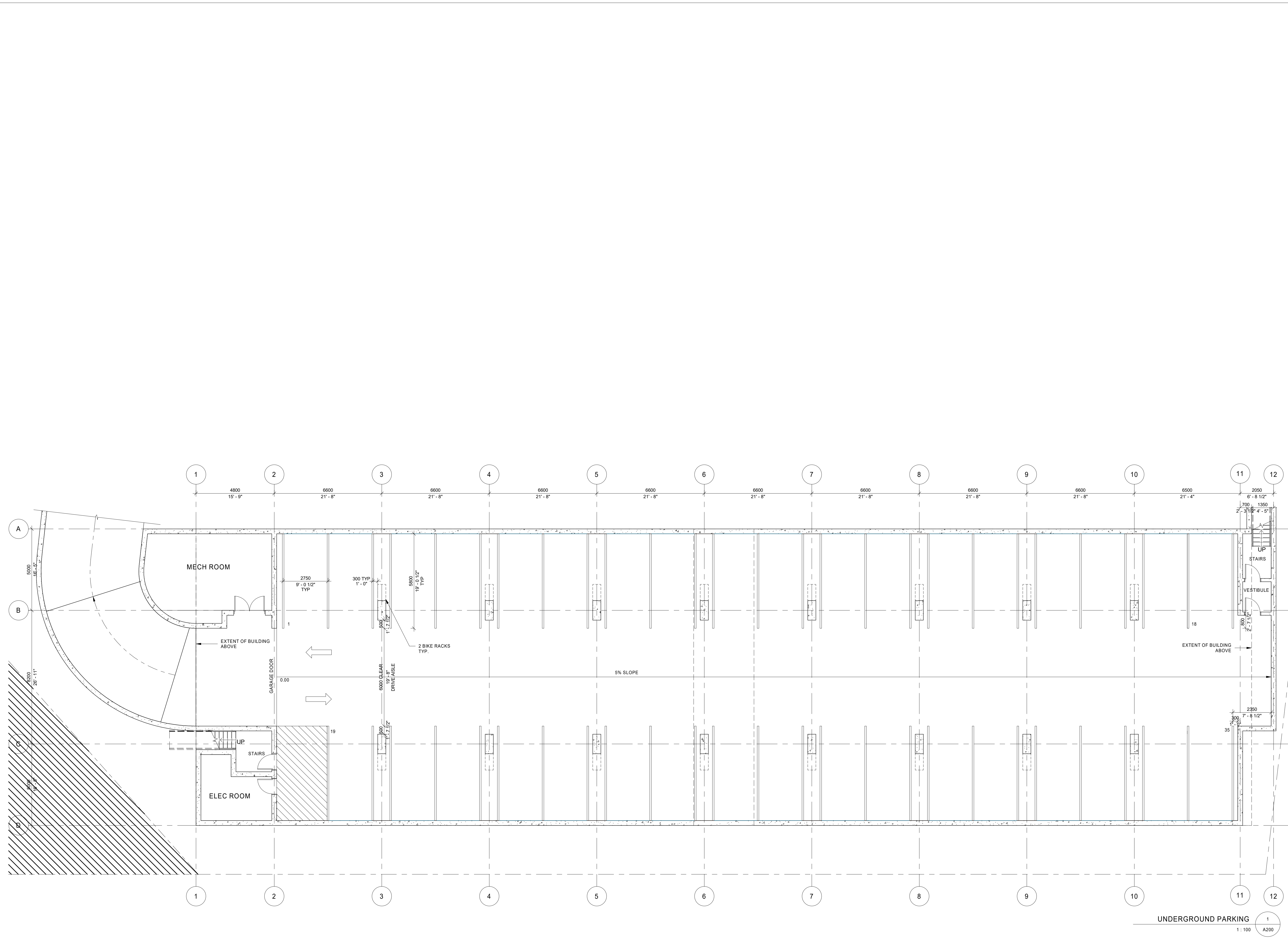
DRAWING TITLE:
ROOF PLAN

DRAWN BY:	SW	DATE:	2020/11/13
CHECKED BY:	GD	SCALE:	1:100

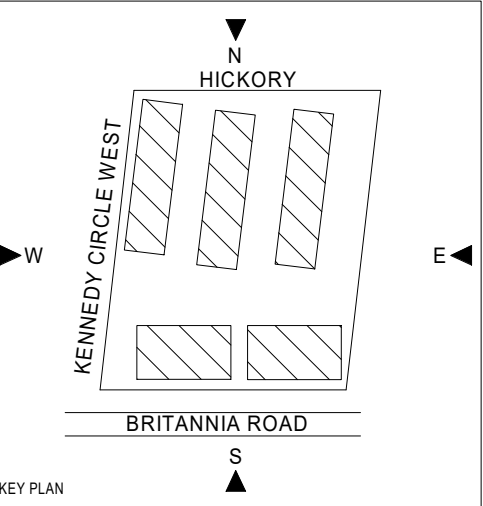
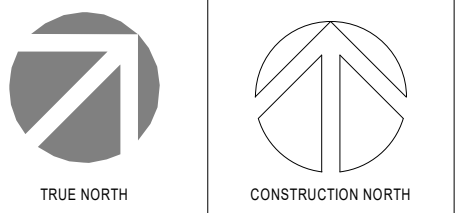
PROJECT NO.: **19018**

DRAWING NO.: **A204**

D1 & D2 ROOF PLAN 1
1:100 A204



PROJECT LOGO



No.	DESCRIPTION	DATE
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2	TOWN ISSUANCE	2020/11/13
3	ISSUED FOR ZBA	2020/11/20

REVISIONS:

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SEAL:

CONSULTANTS:

PROJECT:
BOYNE URBAN BRITANNIA ROAD
 8671 - 8751 BRITANNIA ROAD,
 MILTON

DRAWING TITLE:
UNDERGROUND PARKING

DRAWN BY: SW DATE: 2020/11/20
 CHECKED BY: GD SCALE: 1:100

PROJECT NO: **19018**

DRAWING NO: **A200**

FIGURE 4
DS-065-23



PROPOSED TYP EAST ELEVATION



PROPOSED TYP NORTH ELEVATION



PROPOSED TYP WEST ELEVATION



PROPOSED TYP SOUTH ELEVATION

TYP PROPOSED ELEVATIONS

BLOCKS A, B & C



PROPOSED STREET PERSPECTIVES

mcCallumSather

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Hamilton, ON L8L 6A1
905.526.6700

19018_8671 & 8751 Britannia Road



PROPOSED STREET PERSPECTIVES

mcCallumSather

Westinghouse HQ, 2nd Floor
286 Sanford Ave. N.
Hamilton, ON L8L 6A1
905.526.6700

19018_8671 & 8751 Britannia Road



PROPOSED AERIAL PERSPECTIVES

mcCallumSather

Westinghouse HQ, 2nd Floor
286 Sanford Ave. N.
Hamilton, ON L8L 6A1
905.526.6700

19018_8671 & 8751 Britannia Road



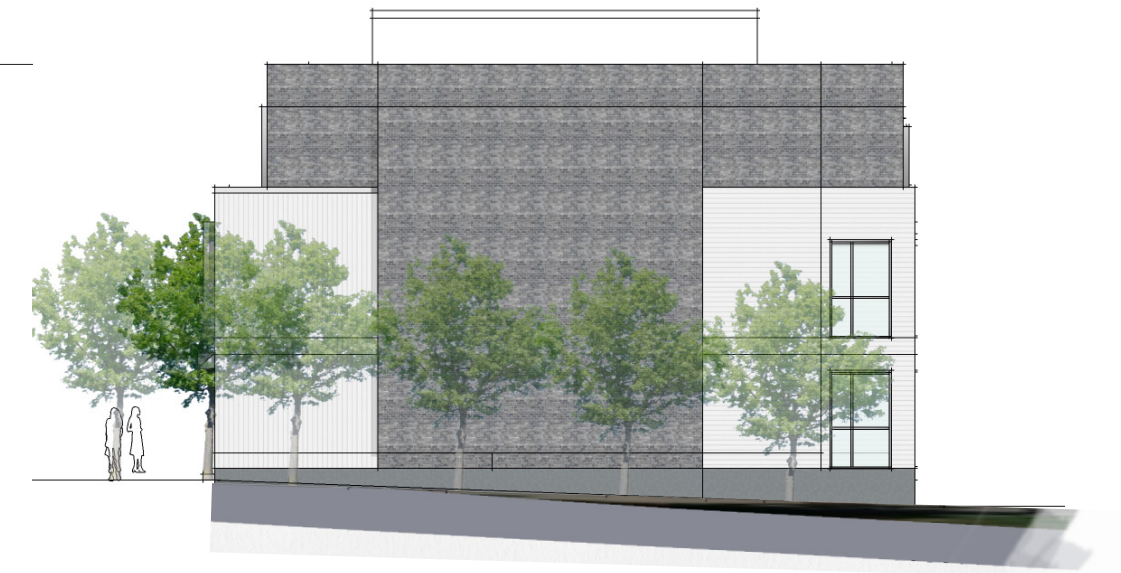
PROPOSED TYP NORH ELEVATION



PROPOSED TYP EAST ELEVATION



PROPOSED TYP SOUTH ELEVATION



PROPOSED TYP WEST ELEVATION

TYP PROPOSED ELEVATIONS

BLOCKS D1 & D2



PROPOSED STREET PERSPECTIVES

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19018_8671 & 8751 Britannia Road



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19018_8671 & 8751 Britannia Road



PROPOSED STREET PERSPECTIVES

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19018_8671 & 8751 Britannia Road



**PROPOSED
AERIAL PERSPECTIVES**

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19018_8671 & 8751 Britannia Road



THE CORPORATION OF THE TOWN OF MILTON

BY-LAW -2023

BEING A BY-LAW TO AMEND THE TOWN OF MILTON COMPREHENSIVE ZONING BY-LAW 016-2014, AS AMENDED, PURSUANT TO SECTION 34 OF THE *PLANNING ACT* IN RESPECT OF THE LANDS DESCRIBED AS PART OF LOT 6, CONCESSION 3, FORMER GEOGRAPHIC TOWNSHIP OF TRAFALGAR, TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (BOYNE URBAN DEVELOPMENT INC.) - FILE: Z-02/21

WHEREAS the Council of the Corporation of the Town of Milton deems it appropriate to amend Comprehensive Zoning By-law 016-2014, as amended;

AND WHEREAS the Town of Milton Official Plan provides for the lands affected by this by-law to be zoned as set forth in this by-law;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Schedule A to Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by changing the existing Future Development (FD) zone symbol to a Residential Medium Density II - Special Provision 340 (RMD2*340) zone symbol on the land shown on Schedule A attached hereto.
2. **THAT** Section 13.1.1 of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding Section 13.1.1.340 to read as follows:

Residential Medium Density II - Special Provision 340 (RMD2*340) Zone

Notwithstanding any definition and provision in the by-law to the contrary, the following shall apply:

i) Additional Permitted Uses:

- a. Stacked Townhouse Dwelling, subject to the zoning standards for Multiple Dwelling except where further amended by this bylaw.

ii) Zone Standards for All Dwelling Types:

- a. Minimum Front Yard Setback (Hickory Crescent): 2.0 metres
- b. Minimum Interior Side Yard Setback: 1.2 metres
- c. Minimum Exterior Side Yard Setback (Kennedy Circle W): 2.0 metres
- d. Minimum Rear Yard Setback (Britannia Road): 3.0 metres
- e. Minimum Landscaped open space: 27%

iii) Special Site Provisions

- a. For the purpose of this zoning by-law, 'Lot' shall mean the perimeter of the aggregate of contiguous parcels of land and/or dwelling units under separate ownership which are described in a Plan of Condominium.
 - b. Minimum off-street parking requirements:
 - i. Resident parking provided in any combination of garage, exclusive use driveway, and common parking areas: 91 spaces;
 - ii. Visitor parking: 16 spaces; and
 - iii. Of the spaces required by i. and ii. above, 2 resident spaces and 1 visitor space shall be accessible parking spaces.
 - c. Maximum width of an exclusive use driveway: 3.6 metres.
 - d. Minimum setback of a parking area from an Interior Side Lot line: 1.2 metres.
 - e. Minimum setback of a parking structure from an Interior Side Lot line: 0.3 metres.
 - f. A minimum setback of 3.0 metres shall be permitted from any wall or structure enclosing an exit or entrance ramp above or below grade to a street line abutting a public street provided that the ramp is not directly accessible from the public street.
 - g. Section 5.9 v) shall not apply.
3. If no appeal is filed pursuant to Section 34(19) of the *Planning Act*, R.S.O. 1990, c. P.13, as amended, or if an appeal is filed and the Ontario Land Tribunal dismisses the appeal, this by-law shall come into force on the day of its passing. If the Ontario Land Tribunal amends the by-law pursuant to Section 34 (26) of the *Planning Act*, as amended, the part or parts so amended come into force upon the day the Tribunal's Order is issued directing the amendment or amendments.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

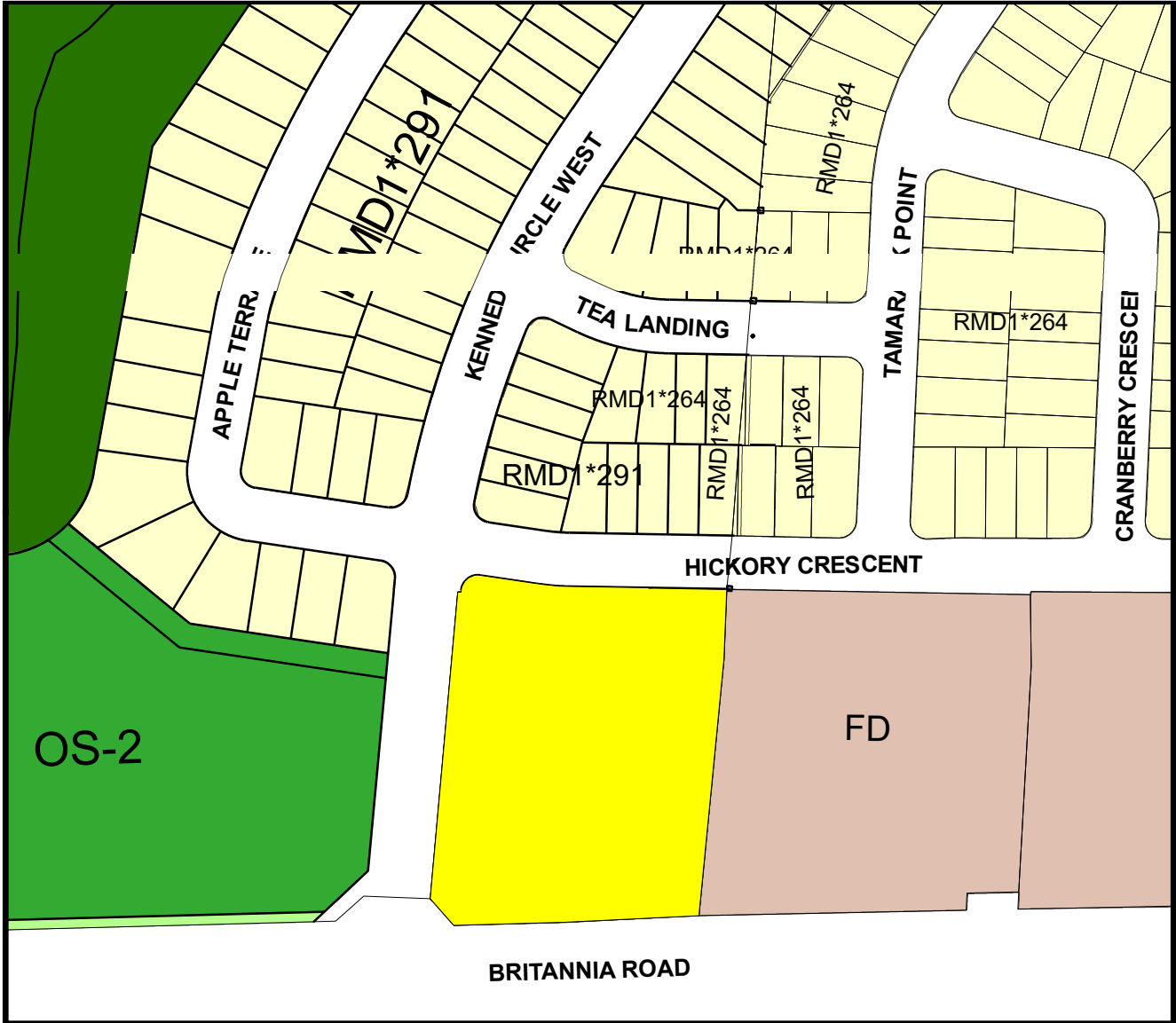
Gordon A. Krantz Mayor

Meaghan Reid Town Clerk


SCHEDULE A
TO BY-LAW NO. -2023

TOWN OF MILTON

PART OF LOT 6, CONCESSION 3, N.S
Town of Milton



THIS IS SCHEDULE A
TO BY-LAW NO. -2023 PASSED
THIS ___ DAY OF _____, 2023.

 RMD2*340 - Residential Medium Density II
Special Provision 340

MAYOR - Gordon A. Krantz

CLERK - Meaghen Reid



PARTNERS:

GLEN SCHNARR, MCIP, RPP**GLEN BROLL**, MCIP, RPP**COLIN CHUNG**, MCIP, RPP**JIM LEVAC**, MCIP, RPP

July 19, 2021

Refer To File: 265-033

Town of Milton
Development Services
150 Mary Street
Milton, ON
L9T 6Z5

Attention: Barbara Koopmans, MPA, MCIP, RPP, CMO
Commissioner, Development Services

**Re: Public Meeting for 8671 & 8751 Britannia Road, Milton
Staff Report DS-057-21 (July 19, 2021)
Comments from Mil Con Three Development Ltd.
(Fieldgate Developments)
Boyne Survey Secondary Plan Area
Town of Milton, Regional Municipality of Halton**

Glen Schnarr & Associates Inc. (GSAI) are the planning consultants representing Mil Con Three Developments Limited (Fieldgate Developments). We read with interest the staff report related to this evening's public meeting related to 8671 & 8751 Britannia Road which is immediately adjacent to our clients' lands.

We note that the proposal for 64 townhouse dwelling units on the subject lands will be accommodated within "*five, 3-storey townhouse blocks connected by a one-way private road with access to/from Hickory Crescent that will be constructed as part of the adjacent Mil Con 3 (Fieldgate) subdivision*". We also note that the staff report acknowledges that the applicant is in the process of acquiring two smaller parcels of land (i.e. a small triangular parcel from the adjacent church property, and **a residential reserve located on the south side of the future Hickory Crescent within the Mil Con 3 (Fieldgate) subdivision**). The report specifies that in order for the applicant to advance the consent application relating to the acquisition of the residential reserve from the Mil Con 3 subdivision, the lands must first be draft approved and that staff anticipates draft approval of the Mil Con 3 subdivision in the very near future. We wish to acknowledge that our clients (Fieldgate Developments) look forward to working with this owner (Boyne Urban Development Inc.) to secure a purchase and sale agreement to facilitate the sale of these lands to allow for this townhouse development to proceed.

10 KINGSBRIDGE GARDEN CIRCLE
SUITE 700
MISSISSAUGA, ONTARIO
L5R 3K6
TEL (905) 568-8888
FAX (905) 568-8894
www.gsai.ca



We also wish to note that this proposed development will also be subject to cost sharing obligations related to both the road and servicing connection components of this proposed development. Our clients are looking forward to working with the owner in that regard, as well.

Please continue to keep us apprised of any future meetings related to this project and do not hesitate to contact the undersigned at 905-568-8888 x235 if you have any questions related to this submission.

Yours very truly,

GLEN SCHNARR & ASSOCIATES INC.

Karen Bennett, MCIP, RPP
Senior Associate

c. Mil Con Three Developments Limited



The Corporation of the Town of Milton

Report To: Council
From: Glen Cowan, Chief Financial Officer / Treasurer
Date: December 18, 2023
Report No: CORS-060-23
Subject: Purchasing Various - December 2023

Recommendation:	<p>THAT Council approve the budget amendments and related funding sources as outlined on Schedule A.</p> <p>THAT the contract award for Play Equipment for Various Parks to Openspace Solutions Inc. in the amount of \$113,442 (exclusive of HST) for Beaty Trail Park and to ABC Recreation Ltd. in the amount of \$138,117.39 (exclusive of HST) for Trudeau Park be approved as outlined on Schedule B.</p> <p>THAT the contract award for Transit Bus Purchases to Nova Bus in the amount of \$5,376,827 (exclusive of HST) be approved as outlined on Schedule C.</p> <p>THAT the contract increase for Engineering Review of the Design of the Boyne Active Transportation Link to Canadian National (CN) in the upset amount of \$60,000 (exclusive of HST) be approved as outlined on Schedule D.</p> <p>THAT the contract increase for Dedicated Internet Connections at Town Facilities to Rogers Communications Canada Inc. in the amount of \$176,400 (exclusive of HST) be approved as outlined on Schedule E.</p> <p>THAT Council approve the Limited Tendering awards for 2023 as per the list of suppliers provided on Schedule F;</p> <p>THAT the contract increase for John Tonelli Parking Lot Improvements to GM BluePlan Engineering Limited in the amount of \$16,006 (exclusive of HST) be received for information as outlined on Schedule G.</p> <p>THAT the contract increase for Pavement Line Marking to Almon Equipment Limited in the amount of \$65,019 (exclusive of HST) be received for information as outlined on Schedule H.</p>
-----------------	---

THAT the contract increase for Winter Control to Associated Paving & Materials Ltd. in the estimated amount of \$80,000 (exclusive of HST) be received for information as outlined on Schedule I.

THAT the contract increase for implementation of Phase 2 of the Human Resource Information System to Workday Limited in the amount of \$312,461 (exclusive of HST) be received for information as outlined on Schedule J.

THAT the delegated authority to rectify the emergency events to the air supported structure (dome) at St. Francis Xavier Catholic Secondary School be received for information as outlined on Schedule K.

THAT the contract award for Street Light and Pole Condition Assessment to R.V. Anderson Associates Limited in the amount of \$121,783 (exclusive of HST) be received for information as outlined on Schedule L.

THAT the single source award for Asbestos Assessments of Town Facilities to Pinchin Ltd. in the amount of \$28,705 (exclusive of HST) be received for information as outlined on Schedule M.

THAT the single source award for Real Estate Services to Royal Lepage Meadowtowne Realty (Phil Prestidge) in the upset amount of \$50,000 (exclusive of HST) be received for information as outlined on Schedule N.

THAT the Manager, Purchasing and Supply Chain Management be authorized to execute the contract(s), as outlined by the purchasing by-law, and the Mayor and the Town Clerk be authorized to sign any required paperwork.

EXECUTIVE SUMMARY

This report is being submitted to obtain Council's authorization on the various items on the attached schedules. It also includes the reporting of a number of awards that have been made under delegated authority for either emergency purposes or during the period between regular meetings of Town Council. Requests are being made as per the guidelines outlined in the Purchasing By-law No. 061-2018 and the Budget Management Policy (Policy No.113).

REPORT

Background

Procurement of goods and services is governed by By-law No. 061-2018. Purchasing activity is undertaken in a manner that is intended to support the Town's mandate to provide effective, responsible government and efficiently deliver services to the residents of Milton.

Discussion

Information pertaining to the recommended purchasing awards is included on the corresponding Schedules (A to N) attached. The awards included in this report can be categorized into several broad themes:

New awards (Schedule B to Schedule C)

This category of awards represent approvals requested by Council for services or goods required. It includes the results of one request for proposal process for the purchase of play equipment at various parks and for the purchase of seven new transit buses through the Metrolinx Transit Procurement Initiative (TPI).

Contract increases (Schedule D to Schedule E)

This category represents approvals requested for contract increases to existing agreements. It includes an increase for Engineering Review of the Design of the Boyne Active Transportation Link and an increase for the expansion on internet connectivity at Town facilities.

Limited Tendering Awards (Schedule F)

The limited tendering category, as defined within the Canadian Free Trade Agreement (CFTA) and Comprehensive Economic and Trade Agreement (CETA), captures a variety of award types including contract renewals, extensions, single or sole source and competitively bid. The awards are recommended to the vendors identified for reasons such as compatibility, existing enterprise application software, joint government procurement initiatives and specialized/unique services or products.

Staff are requesting the ability to issue purchase orders to these suppliers for requirements within the approved budgets, and the awards recommended herein allow for both operating

Discussion

and capital needs to proceed in 2024. The goods and services being acquired include items such as :

- Parts and services for vehicles and equipment;
- Building Automations System (BAS) and HVAC System maintenance; and
- A variety of licenses, support and service related to the Towns' Information Technology software and hardware.

Annual approvals of these items are requested in order to allow continuity of services and provide transparency in the awards. The amounts presented for each supplier are estimates and align with existing budget approvals and proposed budget amounts for 2024.

Reporting for information (Schedule G to Schedule N)

The purchasing by-law includes several areas where staff have the delegated authority to proceed with awards where reporting to Council is required following the award. Those authorities generally relate to times when Council may not hold regular meetings, where an emergency award is required, or contract increases that could not have been reasonably anticipated at the time of the original award require approval in order to avoid the disruption of service or additional cost. Reporting back on awards where specific delegated authority was provided to staff via Council resolution also occurs.

The schedules within this list (G to N) provide reporting on such instances, and include the final awarded amounts for items such as studies related to asbestos reviews and street light condition assessments, adjustments that were required to the Town's winter control contracts for the 2023/24 season as a result of a change in vendor, as well as final reporting on the turf dome costs and insurance recoveries from damage incurred in 2022.



Financial Impact

Schedule A presents the capital budget adjustments that are required to support the items that are recommended for approval in schedules A to N.

The limited tendering awards outlined in Schedule F capture \$5.0 million of approvals related to the operating budget and \$5.3 million of approvals related to the capital program. 69% of these amounts relate to the information technology solutions, and almost all awards relate to services that were in place in 2023. The management of the resulting purchase orders for 2024 will occur in accordance with the Town's financial policies and authorities.

For the balance of schedules where awards are being presented for information (Schedules G to N), financial implications are indicated for each award on the related schedule and any variances have been (or will be) incorporated into the Town's capital and operating variance processes. As noted within schedule K, the Town has secured an insurance recovery related to the damage to the turf dome (including the impact of business interruption). The net proceeds will be deposited into the Town's legal and insurance reserve in accordance with Town policy.

Respectfully submitted,

Glen Cowan
Chief Financial Officer / Treasurer

For questions, please contact:	Sharon Telfer, Manager, Purchasing and Supply Chain Management	Phone: Ext. 2138
	Shirley Xie, Supervisor, Financial Reporting	Phone: Ext. 2472



Attachments

- Schedule A - Reserve and Reserve Fund Transfers
- Schedule B - Proposal award for Park Equipment
- Schedule C - Proposal award for Transit Buses
- Schedule D - Contract increase for CN Design Review
- Schedule E - Contract increase for Internet Connections at Town Facilities
- Schedule F - Limited tendering awards for 2024
- Schedule G - Reporting Back Contract Increase John Tonelli Parking Lot Improvements
- Schedule H - Reporting Back Contract Increase Pavement Line Marking
- Schedule I - Reporting Back Contract Increase Winter Control
- Schedule J - Reporting Back Contract Increase Workday Phase 2
- Schedule K - Reporting Back Emergency Events - Turf Dome
- Schedule L - Reporting Back Proposal Award for Street Light and Pole Assessment
- Schedule M - Reporting Back Single Source Award - Asbestos Assessments
- Schedule N - Reporting Back Single Source Award - Real Estate Services

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

Summary of Changes in Capital Project Budgets and Funding

Schedule		Total Change in Funding Sources Increase / (Decrease)
Project Number	C38010819	
Project Description	Boyne Pedestrian Railway Crossing	
Total Approved Project Budget	\$ 276,606	
Development Charges:		
Roads DC	67,349	67,349
Total Increase/(Decrease) in Funding	67,349	\$ 67,349
Total Revised Project Budget	\$ 343,955	

**COUNCIL AUTHORITY FOR CONTRACT AWARDS
PROPOSAL AWARD**

Project Award	Proposal Award No. 23-165 – Design, Supply and Installation of Play Equipment for Various Parks in 2024
Recommendation	<p>Staff are recommending the award of the proposal for the Design, Supply and Installation of Play Equipment for Various Parks in 2024 to the highest scoring proponent for each park location as follows:</p> <ul style="list-style-type: none"> • Beaty Trail Park to Openspace Solutions Inc. in the amount of \$113,442.00 (exclusive of HST) • Trudeau Park to ABC Recreation Ltd. in the amount of \$138,117.39 (exclusive of HST)
Purpose of Report	As per Section 10.1 of Purchasing By-law No. 061-2018, Council approval is required for proposal awards over \$100,000.
Background information	<p>The Town undertook a Request for Proposal process to seek qualified play equipment suppliers for the design, supply and installation of play equipment for various parks in 2024.</p> <p>This Request for Proposal process allows for competitive proposals from suppliers, a greater range of products for the Town to review and provides a better understanding of key personnel, company profile and experience. The process also provides an opportunity to review new products, themes and trends in playground design. In the end, the Town receives a better product, a design tailored to a specific site and unique play experiences for the parks and the neighbourhood in relation to other parks in the Town.</p> <p>The successful proponents will work as a direct sub-contractor to the General Landscape Contractor for the various parks. The playground installations are scheduled for completion in 2024, subject to finalization of the 2024 budget.</p>
Purchasing Section: Bid Award Information	
Date bid issued	October 6, 2023
Advertisements	Town of Milton website
Closing Date	October 31, 2023
# of Plan takers	Five (5)

<p>Proposal Submissions received</p>	<p>Proposals were received from the following companies:</p> <ul style="list-style-type: none"> • ABC Recreation Ltd. • Openspace Solutions Inc. • Park N Play Design Co Ltd. • Park N Water Ltd. • Play Power LT Canada Inc. 																
<p>Evaluation Criteria</p>	<p>The proposals were reviewed for compliance with the following mandatory criteria:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">IPEMA Certified Play components - IPEMA certificates for each and every play equipment component proposed</td> </tr> <tr> <td style="padding: 5px;">Canadian Standards Association CAN/CSA Z614-14 Annex H, Compliance - signed confirmation letter stating that the playground design is compliant</td> </tr> <tr> <td style="padding: 5px;">Accessibility for Ontarians with Disabilities - Design of Public Spaces Standards (AODA-DOPS) - signed confirmation letter stating design compliance with the applicable Standard</td> </tr> <tr> <td style="padding: 5px;">The resilient safety surfacing will be comprised of an engineered wood fiber (EWF) safety surfacing system, installed per manufacturer's specifications</td> </tr> </table> <p>Proposals meeting the mandatory criteria were further evaluated based on the following criteria:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Demonstrated play value of the proposed equipment and creative theme and appearance of equipment</td> <td style="text-align: right; padding: 5px;">20 points</td> </tr> <tr> <td style="padding: 5px;">Integration of inclusive and accessible aspects with the proposed equipment</td> <td style="text-align: right; padding: 5px;">5 points</td> </tr> <tr> <td style="padding: 5px;">Value for money and value added services</td> <td style="text-align: right; padding: 5px;">5 points</td> </tr> <tr> <td style="padding: 5px;">Maintenance, durability, warranty and service, including timely availability of parts for future repairs and retrofitting</td> <td style="text-align: right; padding: 5px;">25 points</td> </tr> <tr> <td style="padding: 5px;">Compliance with Preferred Specifications listed in Section 8.0 and Additional Preferred Specifications listed in Section 9.0 and ability to meet Schedule</td> <td style="text-align: right; padding: 5px;">25 points</td> </tr> <tr> <td style="padding: 5px;">Design and installation quality and experience of key personnel</td> <td style="text-align: right; padding: 5px;">20 points</td> </tr> </table> <p>An evaluation team with representation from Community Services evaluated the proposals against the established evaluation criteria. Openspace Solutions Inc. was the highest scoring proponent for Beaty Trail Park, and ABC Recreation Ltd. was the highest scoring proponent for Trudeau Park.</p>	IPEMA Certified Play components - IPEMA certificates for each and every play equipment component proposed	Canadian Standards Association CAN/CSA Z614-14 Annex H, Compliance - signed confirmation letter stating that the playground design is compliant	Accessibility for Ontarians with Disabilities - Design of Public Spaces Standards (AODA-DOPS) - signed confirmation letter stating design compliance with the applicable Standard	The resilient safety surfacing will be comprised of an engineered wood fiber (EWF) safety surfacing system, installed per manufacturer's specifications	Demonstrated play value of the proposed equipment and creative theme and appearance of equipment	20 points	Integration of inclusive and accessible aspects with the proposed equipment	5 points	Value for money and value added services	5 points	Maintenance, durability, warranty and service, including timely availability of parts for future repairs and retrofitting	25 points	Compliance with Preferred Specifications listed in Section 8.0 and Additional Preferred Specifications listed in Section 9.0 and ability to meet Schedule	25 points	Design and installation quality and experience of key personnel	20 points
IPEMA Certified Play components - IPEMA certificates for each and every play equipment component proposed																	
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The resilient safety surfacing will be comprised of an engineered wood fiber (EWF) safety surfacing system, installed per manufacturer's specifications																	
Demonstrated play value of the proposed equipment and creative theme and appearance of equipment	20 points																
Integration of inclusive and accessible aspects with the proposed equipment	5 points																
Value for money and value added services	5 points																
Maintenance, durability, warranty and service, including timely availability of parts for future repairs and retrofitting	25 points																
Compliance with Preferred Specifications listed in Section 8.0 and Additional Preferred Specifications listed in Section 9.0 and ability to meet Schedule	25 points																
Design and installation quality and experience of key personnel	20 points																

Financial Planning Section: Budget Impact (Note 1)		
Account Number(s)	C51016624-A1610-7731	C51016524-A1610-7731
Account Description	Beaty Trail Park	Trudeau Park
Project Total Budget	\$ 472,497	\$ 647,746
Contract Budget	\$ 115,000	\$ 140,000
Actual (Note 2)	\$ 115,439	\$ 140,548
Variance (Note 3)	\$ 439 (U)	\$ 548 (U)
Funding Source	Project Variance Account	Project Variance Account

Note 1: Financial impact includes any non-refundable portion of HST.

Note 2: The above award is subject to the finalization of the 2024 Capital Budget. The playground equipment will be included as a cash allowance in the park construction contract.

Note 3: The unfavourable variance will be managed through the reallocation of other expenditure lines within the project.

COUNCIL AUTHORITY FOR CONTRACT AWARDS

Project Award	Metrolinx Transit Procurement Initiative (TPI) for the purchase of conventional transit buses.
Recommendation	Staff is recommending the 12 metre conventional transit bus contract be awarded to Nova Bus through the Metrolinx Transit Procurement Initiative (TPI), for the supply and delivery of seven (7) 12 metre conventional transit buses and associated diagnostic software in the total amount of \$5,376,827 (exclusive of HST).
Purpose of Report	As per Section 10.1 of Purchasing By-law No. 061-2018, Council approval is required.
Background information	<p>In 2019, Council approved participation in the Metrolinx Transit Procurement Initiative (TPI), with the execution of a Multi-Year Governance Agreement for a 5-year term (2019-2024) via CORS-076-19. The Town has benefitted from participating in the Metrolinx TPI by collaborating with agencies to obtain favourable pricing and timely delivery of quality goods and services. Past procurements with Metrolinx TPI include:</p> <ul style="list-style-type: none"> • Transit buses of varying sizes • Intelligent Transportation Systems (ITS) • Onboard Vehicle Surveillance Systems (OBVSS) • Consulting services for Fleet Electrification Strategy <p>Metrolinx released a Request for Proposal (RFP) for the purchase of 12 metre conventional transit buses on September 18, 2020, closing on November 13, 2020. Upon completion of the evaluation and steering committee approval process, a three-year contract was awarded to Nova Bus in January 2021.</p> <p>The 2024 Capital Budget includes three (3) transit bus purchases to support end-of-life vehicle replacement schedules to maintain service reliability and accessibility. Vehicle condition assessments for replacement units were based on Altoona-tested industry reporting for structural integrity, where applicable. The 2024 Capital Budget also includes the acquisition of four (4) vehicles to facilitate fixed-route service growth in Boyne, starting in September 2025.</p> <p>Given current vehicle production and delivery timelines spanning 12-18 months, it remains beneficial to advance this procurement in order to facilitate fixed-route conventional services in a timely matter, subject to finalization of the 2024 Budget.</p> <p>Conventional buses procured will be diesel-powered. However,</p>

Schedule C

	<p>future consideration for changes in vehicle propulsion technology (e.g. battery electric) will be evaluated as part of the Transit Fleet Electrification Strategy that is currently in progress. This strategy will provide recommendations through business case analysis, service feasibility and the identification of associated infrastructure requirements for the potential transition to a battery-electric transit fleet.</p> <p>Through this contract, the Town is to procure:</p> <ul style="list-style-type: none"> • Seven (7) 12 metre conventional transit buses from Nova Bus at a cost of \$765,212 per unit • Vehicle diagnostic software from Nova Bus at a cost of \$20,341 <p>All prices are exclusive of HST and associated vehicle equipment.</p>
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Financial Planning Section: Budget Impact (Note 1)

Account Number(s)	C56012024-A0631-7110	C57010324-A0631-7110
Account Description	Conventional Transit-12 Metre Bus-Replacement	Conventional Transit-12 Metre Bus-Growth
Project Total Budget	\$2,745,073	\$3,660,097
Contract Budget (Note 2)	\$2,559,000	\$3,412,000
Actual (Net of HST Rebate)	\$2,356,738	\$3,114,719
Variance (Note 3)	\$202,262 (F)	\$297,281 (F)
Funding Source	Project Variance Account	Project Variance Account, Development Charges

Note 1: Financial impact includes any non-refundable portion of HST

Note 2: The above award is subject to the finalization of the 2024 Capital Budget.

Note 3: Staff is requesting that the favorable variance remain in the project to accommodate Metrolinx Contract Fee, contingency and bus specification changes during the preproduction process.

**COUNCIL AUTHORITY FOR CONTRACT AWARDS
CONTRACT INCREASE**

Project Award	Contract Increase to Canadian National (CN) for the Engineering Review of the Design of the Boyne Active Transportation Link.
Recommendation	Staff is recommending the approval to proceed with a contract increase to Canadian National (CN) in the upset amount of \$60,000 (exclusive of HST) for the engineering review of the Design of the Boyne Active Transportation Link
Purpose of Report	As per Section 10.1 of Purchasing By-law No. 061-2018, Council approval is required.
Background information	<p>Staff issued purchase order 20-00280, in the amount of \$10,000 (exclusive of HST), to CN to conduct the review of the environmental assessment for the design of the Boyne Active Transportation Link up to 30% completion.</p> <p>CN has been reviewing and providing support on the engineering design of the Boyne Active Transportation Link throughout the design process. This includes reviewing and commenting on the design throughout the design phase, to ensure all CN requirements are met and adhered to with the crossing of their infrastructure.</p> <p>A contract increase is required, as CN must review the design again at 60% completion, when the design reaches 90% completion and the final tender package details. Staff are currently discussing the costing for this work with CN and anticipate the balance of the work to be approximately \$60,000. Therefore, Staff are recommending a contract increase in the upset amount of \$60,000 as final costing is being confirmed. The new contract total will be \$70,000 (exclusive of HST).</p>

Financial Planning Section: Budget Impact (includes non-refundable HST)

Account Number(s)	C38010819-A0614-7290
Account Description	Boyne Active Transportation Link
Project Total Budget	\$ 276,606
Contract Budget	\$ 0
Actual (Net of HST Rebate)	\$ 61,056
Variance	\$ 61,056 (U)
Funding Source	Development Charges
Additional Budget Requested	\$6,293 (Note 2)
Funding Source	Development Charges

Note 1: Financial impact includes any non-refundable portion of HST.

Note 2: Separate from the tender award, additional budget is expected to be required with respect to project management.

**COUNCIL AUTHORITY FOR CONTRACT AWARDS
CONTRACT INCREASE**

Project Award	Contract Increase for Rogers Communications Canada Inc. for dedicated internet connections at Town Facilities.
Recommendation	Staff is recommending approval to proceed with a new 5 year contract total value increase for Rogers Communications Canada Inc. in the amount of \$176,400 (exclusive of HST) to provide dedicated internet connections at Town Facilities.
Purpose of Report	As per Section 10.1 of Purchasing By-law No. 061-2018, Council approval is required.
Background information	<p>The Town of Milton relies on site-to-site fiber optic communication links between its various facilities to provide a robust, reliable and secure network infrastructure that supports critical Town-wide information technology services. As part of this robust and reliable network infrastructure, the Town also offers free high speed internet access to residents and patrons across all publicly- accessible Town facilities. Presently, the Town relies on a single communication service provider for all its site-to-site communication links as well as its primary internet connection that allows the Town to communicate with and interface to the outside world. Public internet browsing from free Wi-Fi services offered at Town facilities traverses through the Town's site-to-site communication links and out its primary internet connection as well. Additionally, as internet-connectivity requirements continue to become more pervasive across the organization, the Town has experienced an increase in traditionally non internet-connected appliances and internet of thing (IOT) devices now requiring access to the internet in order to take advantage of full functionality or offer efficient support and/or monitoring. It is now common in many Town facilities to require a dedicated internet connection on a building automation or mechanical system that monitors/controls lights, heating, cooling, power distribution, etc.</p> <p>In order to increase network resiliency within the Town's IT infrastructure and limit potential future impacts of single service provider internet failures, the organization needs to ensure it provides a dedicated backup internet connection at its remote facilities that can be leveraged in times of need. The importance of this has grown over the past couple years as the organization has begun to invest and implement new cloud-based solutions that facilitate many internal and external Town services. A backup internet provider would be able to operate independently, irrespective of any outages or issues experienced with the Town's primary service provider. The organization will also be able to offload free public Wi-Fi traffic to this standalone backup connection. This would free up valuable bandwidth and availability on the Town's high performance site-to-site connection links and</p>

Schedule E

	<p>ensure the organization could continue to maintain necessary internal communications and critical IT services, even during periods of high Wi-Fi usage. Additionally, the Town will gain a cost-effective method to facilitate offering internet access as required to IOT devices and mechanical systems without impacting the availability or security of internal communications and core IT systems running over its site-to-site links and the organization's primary internet connection.</p> <p>Staff are requesting a contract increase to Rogers Communications in the amount of \$176,400 (exclusive of HST) in order to provide backup internet connectivity at 3 remote facilities within the organization for a period of 60 months. Rogers Communications meets the Town's requirements of being able to operate independently of the Town's current primary internet service provider and is able to provision a service that meets the technical specifications required by the Town to fully leverage this connection in the manner(s) outlined within this report. Rogers Communications is presently the Town's primary cellular communication provider under Vendor of Record (VOR) agreement OSS-00415819 and was recently awarded a 36 month contract to provide the Town with Absolute Software Secure Access software licenses (CORS-056-23).</p> <p>The Town will evaluate its options for expanding backup internet connection options at remaining facilities and will opt to issue a public tender or return to Council in 2024 for additional contract increases to existing communications vendors if deemed the most appropriate path forward for the organization.</p>
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Financial Planning Section: Budget Impact (Note 1)	
Account Number(s)	2216-3706
Account Description	Technology Service Programs - Communications
Project Total Budget	N/A
Contract Budget	\$ 0
Actual (Net of HST Rebate)	\$ 35,901
Variance (Note 2)	\$ 35,901 (U)
Funding Source	Operating

Note 1: Financial impact includes any non-refundable portion of HST.

Note 2: This contract commits the Town to a five year operational expense of \$35,280 (exclusive of HST) annually. Although this contract increase was not specifically incorporated into the planned spending for 2024, it is anticipated that the contract increase can be managed within the overall IT budget. Spending relative to the approved budgets will be reviewed with Financial Planning and any variances reported through the variance process. The increases will be considered in the development of the 2025 budget.

COUNCIL AUTHORITY FOR CONTRACT AWARDS

Project Award	Limited Tendering Suppliers for 2024																																		
Recommendation	Staff are recommending the limited tendering requests for 2024 be awarded as per the list of suppliers in the body of this report and attached as Schedule F Attachment – 2024 Limited Tendering Request Estimates																																		
Purpose of Report	As per Section 10.1 of Purchasing By-law No. 061-2018, Council approval is required.																																		
Background information	<p>The limited tendering category as defined within the Canadian Free Trade Agreement (CFTA) and Comprehensive Economic and Trade Agreement (CETA), captures a variety of award types including contract renewals, extensions, single or sole source and competitively bid. The awards are recommended to the vendors identified for reasons such as compatibility, existing enterprise application software's, joint government procurement initiatives and specialized/unique services or products. These awards are utilized mostly in areas such as information technology, fleet, traffic, transit or facilities systems.</p> <p>Staff are requesting a limited tendering designation for these suppliers and the ability to issue purchase orders for any requirements within the approved financial policies and the dollar thresholds identified in the attached schedule. These contracts are still being negotiated by staff and have been previously approved by Council on a limited tendering or competitive basis and the Schedule F attachment indicates the limited tendering request for 2024. The limited tendering suppliers for 2024 are as follows:</p> <table border="1" data-bbox="646 1247 1552 1974"> <thead> <tr> <th data-bbox="646 1247 1003 1276">Vendor:</th> <th data-bbox="1003 1247 1552 1276">Description of Service:</th> </tr> </thead> <tbody> <tr> <td data-bbox="646 1276 1003 1314">Joe Johnson Equipment</td> <td data-bbox="1003 1276 1552 1314">Trackless repairs/equipment</td> </tr> <tr> <td data-bbox="646 1314 1003 1352">Viking-Cives Ltd.</td> <td data-bbox="1003 1314 1552 1352">Snow Plow Parts</td> </tr> <tr> <td data-bbox="646 1352 1003 1390">The Equipment Specialist</td> <td data-bbox="1003 1352 1552 1390">Tymco Sweeper Parts & Service</td> </tr> <tr> <td data-bbox="646 1390 1003 1428">Toromont/Cat</td> <td data-bbox="1003 1390 1552 1428">Cat Loader Parts & Service</td> </tr> <tr> <td data-bbox="646 1428 1003 1465">Sheehan Equipment Ltd.</td> <td data-bbox="1003 1428 1552 1465">Volvo Dump Truck Parts & Service</td> </tr> <tr> <td data-bbox="646 1465 1003 1503">Bridgestone/Kal Tire</td> <td data-bbox="1003 1465 1552 1503">Tires (Government Program)</td> </tr> <tr> <td data-bbox="646 1503 1003 1541">Michelin North America</td> <td data-bbox="1003 1503 1552 1541">Tires (Government Program)</td> </tr> <tr> <td data-bbox="646 1541 1003 1579">Nortrax Canada Inc</td> <td data-bbox="1003 1541 1552 1579">Construction and forestry equipment dealer</td> </tr> <tr> <td data-bbox="646 1579 1003 1675">Capital Paving Inc./ Halton Asphalt Supply</td> <td data-bbox="1003 1579 1552 1675">Asphalt for Hot Patch Maintenance /Regional Roads/Surface Treatment Program</td> </tr> <tr> <td data-bbox="646 1675 1003 1713">WSP Canada Ltd.</td> <td data-bbox="1003 1675 1552 1713">Brookville Groundwater Monitoring</td> </tr> <tr> <td data-bbox="646 1713 1003 1751">Econolite Canada Inc.</td> <td data-bbox="1003 1713 1552 1751">Traffic Controller</td> </tr> <tr> <td data-bbox="646 1751 1003 1789">Tacel Ltd.</td> <td data-bbox="1003 1751 1552 1789">Accessible Pushbuttons</td> </tr> <tr> <td data-bbox="646 1789 1003 1827">Innovative Traffic Solutions</td> <td data-bbox="1003 1789 1552 1827">Fire Prevention - Opticom</td> </tr> <tr> <td data-bbox="646 1827 1003 1864">Electromega</td> <td data-bbox="1003 1827 1552 1864">School Zone Flasher</td> </tr> <tr> <td data-bbox="646 1864 1003 1940">Ramudden Digital (formerly Stinson ITS)</td> <td data-bbox="1003 1864 1552 1940">Miovision Equipment</td> </tr> <tr> <td data-bbox="646 1940 1003 1974">Miovision</td> <td data-bbox="1003 1940 1552 1974">Miovision Equipment Maintenance</td> </tr> </tbody> </table>	Vendor:	Description of Service:	Joe Johnson Equipment	Trackless repairs/equipment	Viking-Cives Ltd.	Snow Plow Parts	The Equipment Specialist	Tymco Sweeper Parts & Service	Toromont/Cat	Cat Loader Parts & Service	Sheehan Equipment Ltd.	Volvo Dump Truck Parts & Service	Bridgestone/Kal Tire	Tires (Government Program)	Michelin North America	Tires (Government Program)	Nortrax Canada Inc	Construction and forestry equipment dealer	Capital Paving Inc./ Halton Asphalt Supply	Asphalt for Hot Patch Maintenance /Regional Roads/Surface Treatment Program	WSP Canada Ltd.	Brookville Groundwater Monitoring	Econolite Canada Inc.	Traffic Controller	Tacel Ltd.	Accessible Pushbuttons	Innovative Traffic Solutions	Fire Prevention - Opticom	Electromega	School Zone Flasher	Ramudden Digital (formerly Stinson ITS)	Miovision Equipment	Miovision	Miovision Equipment Maintenance
Vendor:	Description of Service:																																		
Joe Johnson Equipment	Trackless repairs/equipment																																		
Viking-Cives Ltd.	Snow Plow Parts																																		
The Equipment Specialist	Tymco Sweeper Parts & Service																																		
Toromont/Cat	Cat Loader Parts & Service																																		
Sheehan Equipment Ltd.	Volvo Dump Truck Parts & Service																																		
Bridgestone/Kal Tire	Tires (Government Program)																																		
Michelin North America	Tires (Government Program)																																		
Nortrax Canada Inc	Construction and forestry equipment dealer																																		
Capital Paving Inc./ Halton Asphalt Supply	Asphalt for Hot Patch Maintenance /Regional Roads/Surface Treatment Program																																		
WSP Canada Ltd.	Brookville Groundwater Monitoring																																		
Econolite Canada Inc.	Traffic Controller																																		
Tacel Ltd.	Accessible Pushbuttons																																		
Innovative Traffic Solutions	Fire Prevention - Opticom																																		
Electromega	School Zone Flasher																																		
Ramudden Digital (formerly Stinson ITS)	Miovision Equipment																																		
Miovision	Miovision Equipment Maintenance																																		

Schedule F

	Consat Telematics	Hosting Fee, Service Level Agreement, Scheduling and Support Licensing, Transit Information Technology Systems (ITS) Equipment and Project
	Safe Fleet	Onboard vehicle camera system equipment, subscription/licensing
	Spare Labs Inc.	Specialized - On Demand Scheduling Software Licensing/Service Fees
	Garival	Warranty and System Support Licensing, Annual System Audit GFI Fareboxes
	Siemens Canada Ltd.	BAS, Security, Fire Systems maintenance - MNCC
	Lifesaving Society	Swim Program Provider
	Bell	Landline telephone services & site to site fibre optic network
	Rogers	Mobility, cellular and internet connectivity services
	Telus	Mobility and cellular services
	Computer Methods (CMIC)	Financial System Software Licensing and Support
	GHD (formerly eSolutions Group)	Online Web Services Hosting & Support
	ESRI Canada	GIS System Software Licensing & Support
	CentralSquare (formerly FDM Software)	Fire Records Management and CAD System Software Licensing & Support
	Introtel Communications	Telephone System Licensing & Support
	Oracle Corporation	Database Software Licensing & Support
	Public Sector Digest (RAC)	Budget System Software Licensing & Support
	Vailtech	Taxation System Software Licensing & Support
	Gibraltar Solutions	Software licensing reseller and maintenance renewal services (VMware, Citrix, HP, Proofpoint, Commvault, Cisco)
	MNP (formerly Netcyclops)	Software licensing reseller and maintenance renewal services (RSA, Antivirus, Security Scanning) & PCI Compliance/Auditing Services
	ACCEO Solutions	Parking Enforcement System Licensing & Support
	Soft Choice	Adobe Licensing Reseller
	Planview AdaptiveWork (formerly BLS Clarizen)	Project Management Information System Software Licensing & Support
	Computacenter (formerly Teramach)	Firewall software licensing, maintenance/subscription renewal (OECM)
	Clearrisk Inc.	Claim Management Software Licensing & Support
	Granicus (formerly Calytera)	Building Permit & Business Licenses + Community Engagement Software licensing, subscription and support
	Bloomberg Software Company	Financial investment tool licensing
	Wilmac Co.	Emergency Call Recording Software Licensing & Support
	Teranet Inc.	Parcel agreement, lien searches and delivery of registered easement data
	Zoom Video Communications Software Company	Videotelephony and peer-to-peer messaging Software Licensing & Support

Schedule F

	Solid CadGroup Inc	Software licensing reseller and maintenance renewal services (Bluebeam, AutoCAD)
	Compugen Inc	Microsoft licensing provider
	SiteImprove Inc.	Website accessibility, analytics, compliance and performance monitoring annual licensing and support
	TopDesk Canada Inc.	IT service management software annual licensing and support
	TES Information Technology Ltd	All-in-one transportation data management & analytics solution.
	Workday Ltd.	Financial management, human capital management, and student information system software vendor
	Access 2 Network Inc.	Software licensing reseller and maintenance renewal services (Nagios network monitoring)
	Dell Canada Inc.	Backup storage devices
	Xplor Technologies	Recreation Management and Payment Processing annual licensing and support
	eScribe Software Ltd.	Council meeting management software licensing & support (CORS-021-21)
	Microsoft Corporation	Software & cloud storage licensing
	Global Unified Solution Services Inc.	Council Meeting AV System Integration & Support
	Starfield LION	Safety equipment supplier
	AJ Stone	Air cylinders, struts and other fire accessories
	1200 Degrees Ontario	Specializes in sale of parts and service for fire vehicles
	City View Specialty Vehicles	Provider of materials and supplies for repair and maintenance of fire vehicles
	SafeDesign Apparel Ltd.	Personal protective equipment and accessory provider
	M & L Supply Fire & Safety	Safety equipment supplier
	Motorola	The supply of radio equipment for the Transit buses and Fire vehicles
	DiCAN Inc.	Software licensing reseller and maintenance renewal services (Geotab AVL)

Financial Planning Section: Budget Impact (Note 1)

Note 1: The attached Schedule F List of 2024 Limited Tendering Request Estimates indicates the requests for 2024. The estimated spend for each limited tendering request has been included in the proposed 2024 budget (or prior approved capital budgets) and is subject to budget approval.

Attachment – Schedule F – List of 2024 Limited Tendering Request Estimates

SCHEDULE F - ATTACHMENT							
Description	Vendor	Type of Request	2022 Actuals	2023 YTD Actuals (Jan 1 - Sept 30)	Estimate for 2024		
					Operating	Capital	TOTAL
Fleet - Community Services							
Trackless repairs/equipment	Joe Johnson Equipment	Compatibility/Proprietary	\$ 24,900	\$ 595,748	\$ 32,689	\$ 480,529	\$ 513,218
Snow Plow Parts	Viking-Cives Ltd.	Compatibility/Proprietary	\$ 100,317	\$ 51,352	\$ 33,307	\$ -	\$ 33,307
Tymco Sweeper Parts & Service	The Equipment Specialist	Compatibility/Proprietary	\$ -	\$ -	\$ 30,244	\$ -	\$ 30,244
Cat Loader Parts & Service	Toromont/Cat	Compatibility/Proprietary	\$ 35,727	\$ 19,843	\$ 53,943	\$ -	\$ 53,943
Volvo Dump Truck Parts & Service	Sheehan Equipment Ltd.	Compatibility/Proprietary	\$ 141,485	\$ 186,362	\$ 97,234	\$ -	\$ 97,234
Tires (Government Program)	Bridgestone/Kal Tire	Govt Agreement	\$ 30,707	\$ 26,068	\$ 25,716	\$ -	\$ 25,716
Tires (Government Program)	Michelin North America	Govt Agreement	\$ 64,043	\$ 56,464	\$ 44,787	\$ -	\$ 44,787
Construction and forestry equipment dealer	Nortrax Canada Inc	Compatibility/Proprietary			\$ 38,172	\$ -	\$ 38,172
Operations - Community Services							
Asphalt for Hot Patch Maintenance/Regional Roads/Surface Treatment Program	Capital Paving Inc./Halton Asphalt Supply	Single Source	\$ 33,896	\$ 118,036	\$ 92,713	\$ 302,722	\$ 395,435

SCHEDULE F - ATTACHMENT							
Description	Vendor	Type of Request	2022 Actuals	2023 YTD Actuals (Jan 1 - Sept 30)	Estimate for 2024		
					Operating	Capital	TOTAL
Brookville Groundwater Monitoring	WSP Canada Ltd.	Single Source	\$ 30,543	\$ 7,546	\$ 36,762	\$ -	\$ 36,762
Traffic - Development Services							
Traffic Controller	Econolite Canada Inc.	Single Source	\$ 79,742	\$ -	\$ -	\$ 162,632	\$ 162,632
Accessible Pushbuttons	Tacel Ltd.	Compatibility/Proprietary	\$ 9,481	\$ 9,857	\$ -	\$ 35,295	\$ 35,295
Fire Prevention- Opticom	Innovative Traffic Solutions	Single Source	\$ 8,244	\$ 157,189	\$ -	\$ 110,255	\$ 110,255
School Zone Flasher	Electromega	Single Source	\$ -	\$ -	\$ -	\$ 73,267	\$ 73,267
Miovision Equipment	Ramudden Digital (Formerly Stinson ITS)	Single Source	\$ 178,593	\$ 130,653	\$ -	\$ 177,883	\$ 177,883
Miovision Equipment Maintenance	Miovision	Compatibility/Proprietary Equipment	\$ 115,554	\$ 121,931	\$ 134,327	\$ -	\$ 134,327
Transit - Community Services							
Hosting Fee, Service Level Agreement, Scheduling and Support Licensing, Transit Information Technology Systems (ITS) Equipment and Project	Consat Telematics	EAS/Compatibility/Proprietary	\$ 81,951	\$ 136,625	\$ 95,260	\$ 96,165	\$ 191,425

SCHEDULE F - ATTACHMENT

Description	Vendor	Type of Request	2022 Actuals	2023 YTD Actuals (Jan 1 - Sept 30)	Estimate for 2024		
					Operating	Capital	TOTAL
Onboard vehicle camera system equipment, subscription/licensing	Safe Fleet	EAS/Compatibility/Proprietary	\$ -	\$ -	\$ 23,270	\$ 15,000	\$ 38,270
Warranty and System Support Licensing Annual System Audit GFI Fareboxes	Garival	EAS/Compatibility/Proprietary	\$ 105,645	\$ 19,843	\$ 26,470	\$ 122,861	\$ 149,331
Recreation & Facilities - Community Services							
BAS, Security, Fire Systems maintenance - MNCC	Siemens Canada Ltd.	Compatibility/Proprietary	\$ 66,684	\$ 21,642	\$ 49,537	\$ -	\$ 49,537
Swim Program Provider	Lifesaving Society	Single Source	\$ 64,911	\$ 65,087	\$ 70,961	\$ -	\$ 70,961
Information Technology - Corporate Services							
Landline telephone services & site to site fibre optic network	Bell***	Govt Agreement	\$ 333,840	\$ 307,736	\$ 370,000	\$ 25,000	\$ 395,000
Mobility, cellular and internet connectivity services	Rogers***	Govt Agreement	\$ 84,814	\$ 64,044	\$ 144,777	\$ 175,053	\$ 319,830
Mobility and cellular services	Telus	Govt Agreement	\$ 43,267	\$ 21,754	\$ 41,250	\$ 35,616	\$ 76,866
Financial System Software Licensing and Support	Computer Methods (CMIC)	EAS	\$ 223,138	\$ 231,655	\$ 244,300	\$ -	\$ 244,300
Online Web Services Hosting & Support	GHD (formally eSolutions Group)	EAS	\$ 57,898	\$ 69,150	\$ 57,500	\$ 9,000	\$ 66,500

SCHEDULE F - ATTACHMENT

Description	Vendor	Type of Request	2022 Actuals	2023 YTD Actuals (Jan 1 - Sept 30)	Estimate for 2024		
					Operating	Capital	TOTAL
GIS System Software Licensing & Support	ESRI Canada***	EAS/Gov't Agreement	\$ 69,266	\$ 75,603	\$ 102,500	\$ 85,503	\$ 188,003
Fire Records Management and CAD System Software Licensing & Support	CentralSquare (formerly FDM Software)***	EAS	\$ 61,068	\$ 53,867	\$ 231,000	\$ 176,992	\$ 407,992
Telephone System Licensing & Support	Introtel Communications	EAS	\$ 109,202	\$ 56,290	\$ 70,000	\$ 176,832	\$ 246,832
Database Software Licensing & Support	Oracle Corporation	EAS	\$ 196,818	\$ 212,564	\$ 230,000	\$ -	\$ 230,000
Budget System Software Licensing & Support	Public Sector Digest (RAC)	EAS	\$ 42,885	\$ 81,830	\$ 47,550	\$ 48,699	\$ 96,249
Taxation System Software Licensing & Support	Vailtech	EAS	\$ 38,597	\$ 19,584	\$ 20,500	\$ 54,004	\$ 74,504
Software licensing reseller and maintenance renewal services (VMware, Citrix, HP, Proofpoint, Commvault, Cisco)	Gibraltar Solutions	EAS	\$ 313,231	\$ 226,861	\$ 375,000	\$ 136,275	\$ 511,275
Software licensing reseller and maintenance renewal services (RSA, Antivirus, Security Scanning) & PCI Compliance/Auditing Services	MNP (formerly Netcyclops)	EAS	\$ 131,855	\$ 2,544	\$ 79,300	\$ 307,289	\$ 386,589

SCHEDULE F - ATTACHMENT

Description	Vendor	Type of Request	2022 Actuals	2023 YTD Actuals (Jan 1 - Sept 30)	Estimate for 2024		
					Operating	Capital	TOTAL
Parking Enforcement System Licensing & Support	ACCEO Solutions	EAS	\$ 29,163	\$ 18,131	\$ 48,000	\$ 136,860	\$ 184,860
Adobe Licensing Reseller	Soft Choice	EAS/Gov't Agreement	\$ 126,262	\$ 46,860	\$ 40,000	\$ 55,158	\$ 95,158
Project Management Information System Software Licensing & Support	Planview AdaptiveWork (formerly BLS Clarizen)	EAS	\$ 25,172	\$ 26,206	\$ 27,000	\$ -	\$ 27,000
Firewall software licensing, maintenance/subscription renewal (OECM)	Computacenter (formally Teramach)	EAS/Gov't Agreement	\$ 75,718	\$ 3,809	\$ 153,000	\$ -	\$ 153,000
Claim Management Software Licensing & Support	Clarrisk Inc.	EAS	\$ 28,223	\$ 30,483	\$ 32,000	\$ 20,000	\$ 52,000
Building Permit & Business Licenses + Community Engagement Software licensing, subscription and support	Granicus (formerly Calytera)	EAS	\$ 61,598	\$ 166,038	\$ 108,600	\$ 296,721	\$ 405,321
Financial investement tool licensing	Bloomberg Software Company	EAS	\$ 40,454	\$ 40,103	\$ 45,000	\$ -	\$ 45,000
Emergency Call Recording Software Licensing & Support	Wilmac Co.	EAS	\$ 55,643	\$ 57,078	\$ 24,000	\$ 2,538	\$ 26,538
Parcel agreement, lien searches and delivery of registered easement data	Teranet Inc.	Compatibility/ Proprietary	\$ 18,512	\$ 18,512	\$ 28,200	\$ -	\$ 28,200

SCHEDULE F - ATTACHMENT

Description	Vendor	Type of Request	2022 Actuals	2023 YTD Actuals (Jan 1 - Sept 30)	Estimate for 2024		
					Operating	Capital	TOTAL
Videotelephony and peer-to-peer messaging Software Licensing & Support	Zoom Video Communications Software Company	EAS	\$ 32,474	\$ 3,986	\$ 43,000	\$ 9,673	\$ 52,673
Software licensing reseller and maintenance renewal services (Bluebeam, AutoCAD)	Solid CadGroup Inc	EAS	\$ 12,246	\$ 16,171	\$ 16,000	\$ 34,355	\$ 50,355
Microsoft licensing provider	Compugen Inc***	EAS	\$ 491,696	\$ -	\$ 655,772	\$ 745,839	\$ 1,401,611
Website accessibility, analytics, compliance and performance monitoring annual licensing and support	SitelImprove Inc.	EAS	\$ 15,874	\$ 34,922	\$ 31,000	\$ -	\$ 31,000
IT service management software annual licensing and support	TopDesk Canada Inc.	EAS	\$ 11,694	\$ 534	\$ 42,000	\$ -	\$ 42,000
All-in-one transportation data management & analytics solution.	TES Information Technology Ltd	EAS	\$ 7,896	\$ -	\$ 11,900	\$ 19,843	\$ 31,743
Financial management, human capital management, and student information system software vendor	Workday Ltd.***	EAS	\$ 870,591	\$ 106,016	\$ 389,000	\$ 30,000	\$ 419,000
Software licensing reseller and maintenance renewal services (Nagios network monitoring)	Access 2 Network Inc.	EAS	\$ 8,980	\$ -	\$ 25,000	\$ 25,440	\$ 50,440

SCHEDULE F - ATTACHMENT

Description	Vendor	Type of Request	2022 Actuals	2023 YTD Actuals (Jan 1 - Sept 30)	Estimate for 2024		
					Operating	Capital	TOTAL
Backup storage devices	Dell Canada Inc.	EAS /Compatibility/ Proprietary	\$ 127,211	\$ 60,386	\$ -	\$ 101,760	\$ 101,760
Recreation Management and Payment Processing annual licensing and support	Xplor Technologies***	EAS	\$ 41,111	\$ 82,222	\$ 87,461	\$ 198,691	\$ 286,152
Council meeting management software licensing & support (CORS-021-21)	eScribe Software Ltd.***	EAS	\$ 40,952	\$ 39,350	\$ 27,100	\$ -	\$ 27,100
Software & cloud storage licensing	Microsoft Corporation	Compatibility/ Proprietary	\$ 481	\$ 11,975	\$ 100,000	\$ -	\$ 100,000
Council Meeting AV System Integration & Support	Global Unified Solution Services Inc.	EAS /Compatibility/ Proprietary	\$ 37,402	\$ 15,124	\$ 6,200	\$ 44,231	\$ 50,431
Fire - Community Services							
Safety equipment supplier	Starfield LION	RFP	\$ 57,433	\$ 900	\$ -	\$ 134,000	\$ 134,000
Air cylinders, struts and other fire accessories	AJ Stone	Single Source	\$ 147,612	\$ 49,471	\$ 18,000	\$ 60,413	\$ 78,413
Specializes in sale of parts and service for fire vehicles	1200 Degrees Ontario	Single Source	\$ -	\$ -	\$ 30,000	\$ 20,000	\$ 50,000
Provider of materials and supplies for repair and maintenance of fire vehicles	City View Specialty Vehicles	Single Source	\$ 2,638	\$ 12,552	\$ 30,000	\$ -	\$ 30,000
Personal protective equipment and accessory provider	SafeDesign Apparel Ltd.	Single Source	\$ 2,910	\$ 85,815	\$ -	\$ 65,000	\$ 65,000

SCHEDULE F - ATTACHMENT

Description	Vendor	Type of Request	2022 Actuals	2023 YTD Actuals (Jan 1 - Sept 30)	Estimate for 2024		
					Operating	Capital	TOTAL
Safety equipment supplier	M & L Supply Fire & Safety	Single Source	\$ 19,141	\$ 25,306	\$ -	\$ 36,800	\$ 36,800
Town-Wide							
The supply of radio equipment for the Transit buses and Fire vehicles	Motorola	Govt Agreement	\$ 12,690	\$ -	\$ 21,611	\$ 96,698	\$ 118,309
Software licensing reseller and maintenance renewal services (Geotab AVL)	DiCAN Inc.	EAS	\$ 186,279	\$ 77,861	\$ 88,700	\$ 307,862	\$ 396,562

*Note: The 2022 Actuals and the 2023 Estimates include the non-refundable portion of HST.

** Includes work to be funded from both the 2023 and prior approved capital budgets.

*** Total estimate for 2024 is inclusive of amounts previously approved via standalone Council reports as outlined in the table on the following page.

Legend:

EAS - Enterprise application systems are large-scale application software systems designed to support the Town's core business processes such as Financials, Purchasing, Facilities,

Government Agreement - a Government program/agreement for discounted pricing for Government agencies

Single Source - Supply of goods or services that can generically be purchased from multiple suppliers, but due to its specialized or unique characteristics, only one source of supply is

Compatibility/Proprietary Equipment - An investment has been made into propriety equipment that replacement/maintenance parts and /or licensed services are only supplied through

Schedule F: ***Identification of previously awarded contracts for Information Technology goods and services

Vendor	2024 Annual Total (Previously Approved)	Authority	Existing Contract Expiry	Description
Rogers	\$29,570	CORS-056-23	2026	Absolute Software Secure Access software licenses
ESRI Canada	\$107,770	CORS-045-23	2026	Small Local Government Enterprise Agreement (SLGEA)
CentralSquare (formerly FDM Software)	\$276,582	CORS-035-23	2029	Property Tax Management system implementation and software licensing
Compugen Inc	\$400,000	CORS-054-22	2025	Microsoft Enterprise Agreement
Workday Ltd.	\$280,908	CORS-029-21	2027	Human Resource Information System
Xplor Technologies (formally PerfectMind Inc)	\$218,801	CORS-015-20 CORS-045-23	2027 2029	Xplor Registration System Xplor Point of Sale System
eScribe Software Ltd.	\$37,092	CORS-021-21	2024	Council Meeting Management Software System
ShinyDocs Corporation	\$156,056	CORS-003-22	2026	Digital Records Management Solution

REPORT TO COUNCIL FOR INFORMATION – CONTRACT INCREASE

Project Award	Reporting back to Council on the Delegated Authority to award the contract increase to GM BluePlan Engineering Limited in the amount of \$16,006 (exclusive of HST) for additional consulting services required for the John Tonelli Sports Centre Facility Improvements.
Purpose of Report	As per Section 7.2.2 of the Purchasing By-law, a report to Council for information is required when the delegated authority provided in that section is utilized.
Background information	<p>Through PDA-CRAN-23-051-08, Staff awarded the design for improvements to the John Tonelli Sports Centre Facility Improvements to GM BluePlan Engineering Limited in the amount of \$40,596 (exclusive of HST). Subsequent change orders in the amount \$7,685 (exclusive of HST) were issued to provide additional CCTV scoping services for the sanitary line.</p> <p>In October, a thorough lighting assessment was undertaken for all areas of the parking lot. Both the north and south parking lots do not meet current lighting design criteria for parking lots and it was recommended that the parking lot lighting be upgraded to meet current minimum lighting standards. As such, additional design fees are required to provide new LED luminaires.</p> <p>The contract increase was required in order to complete the design for the John Tonelli Sports Centre Facility Improvements without delay. The project is currently anticipated to be tendered in January 2024.</p> <p>The requested amount was validated by staff to be in compliance with the Council approved award of GM BluePlan Engineering Limited on the Professional Consulting Services Roster as per the terms of RFP 21-051 (CORS-063-21). The hourly rates, as established through the Competitive Assignment Score Card evaluation RFP process, have been reviewed and validated as being of good value by Parks & Facilities staff (PDA-CRAN-23-051-08).</p> <p>Staff processed PDA-113-23 utilizing Section 7.2.2 of the Purchasing By-law to award this contract increase for additional design fees to GM BluePlan Engineering Limited in the total amount of \$16,006 (exclusive of HST).</p> <p>The new contract total (design) is \$64,287 (exclusive of HST).</p>
Financial Planning Section: Budget Impact <small>(Note 1)</small>	
Account Number(s) Account Description	C58214723-A1634-7220 John Tonelli Sports Centre Parking Lot Design

Project Total Budget	\$ 115,598
Contract Budget	\$ 7,315
Actual	\$16,006
Variance	\$ 8,691 (U) (Note 2)
Funding Source	Federal Grants/Subsidies, Provincial Grants/Subsidies, Project Variance Account
<p>Note 1: This project is eligible for input tax credits, therefore costs do not include HST.</p> <p>Note 2: A required budget increase in an amount of \$8,691 was addressed through PDA-113-23 and therefore not included as part of Schedule A to this purchasing various report.</p>	

REPORT TO COUNCIL FOR INFORMATION - CONTRACT INCREASE

Project Award	Reporting back to Council on the Delegated Authority to award the contract increase to Almon Equipment Limited in the amount of \$65,019 (exclusive of HST) for additional services required for the 2023 Pavement Line Marking Program.
Purpose of Report	As per Section 7.2.2 of the Purchasing By-law, a report to Council for information is required when the delegated authority provided in that section is utilized.
Background information	<p>The contract awarded to Almon Equipment Limited for the 2023 Pavement Line Marking Program was for \$329,527 (exclusive of HST), approved through CORS-028-23. No change orders had been issued. The awarded amount was based on an estimated quantity of pavement line marking needs for 2023.</p> <p>Due to the nature of this contract, there are multiple business units that authorize work to proceed against the related purchase order. Staff proceeded with additional work required to accommodate the following unforeseen work:</p> <ul style="list-style-type: none"> • Traffic, to account for actual quantities painted compared to estimated quantities at the time of the original award, in the amount of \$5,529 • Traffic, for additional PXO line work (beyond original anticipated \$15,000), in the amount of \$38,197 • Infrastructure, for railway crossing line painting, in the amount of \$5,808 • Facility Operations, in order to complete line painting in facility parking lots, in the amount of \$9,500 • Operations, to complete the annual surface treatment program, in the amount of \$5,985 <p>The unit rates for all work match the unit rates obtained through the competitive tender process that facilitated the original award, issued by the Town earlier in 2023 on behalf of the Halton Co-operative Purchasing Group.</p> <p>Staff processed PDA-100-23 utilizing Section 7.2.2 of the Purchasing By-law to award the contract increase. This contract increase of \$65,019 (exclusive of HST) was to facilitate payment for work related to the work orders issued to the contractor, to complete the 2023 pavement line marking program needs. The new contract total is \$394,546 (exclusive of HST).</p>
Financial Planning Section: Budget Impact (Note 1)	
Account Number(s)	Various
Account Description	Line Painting
Project Total Budget	NA

Contract Budget	\$0
Actual (Net of HST Rebate)	\$66,163
Variance (Note 2)	\$66,163 (U)
Funding Source	Capital and Operating

Note 1: Financial impact includes any non-refundable portion of HST

Note 2: The variance was accommodated through reallocation of spending in the capital and operating programs and was managed within the overall department budget.

REPORT TO COUNCIL FOR INFORMATION - CONTRACT INCREASE

Project Award	Reporting back to Council on the Delegated Authority to award the contract increase to Associated Paving & Materials Ltd. for the 2023-2024 Winter Control Program – Equipment and Operator – Tender No. 22-063A
Purpose of Report	As per Section 7.2.2 of the Purchasing By-law, a report to Council for information is required when the delegated authority provided in that section is utilized.
Background information	<p>The Town of Milton requires contracted equipment and operators to provide winter maintenance on both Town and Regional roads (as part of the Regional Maintenance Agreement). These contracts supplement the services provided by Town staff.</p> <p>The Town has issued winter control tenders for various types of equipment including Tandems, Single Axles, Loaders, Graders and Tractors. The cost of the contract includes a combination of standby rates and hourly call out rates. The cost to be incurred is based on the actual call out hours required during the contract term. These contracts also include a MTO fuel index calculation, which is reconciled monthly. The index is used by the Province and many municipalities to manage fluctuating fuel costs through the term of the contract.</p> <p>On CORS-045-23, Council approval was received for contract renewals and contract extensions for the 2023/2024 winter control program. Contract renewals were approved for Associated Paving & Materials Ltd., Blue Chip Building Restoration Ltd., Duff Contracting and Jones Ag Services Limited. Contract extensions were approved for Blue Chip Building Restoration Ltd. and Jones Ag Services Limited.</p> <p>Subsequent to the approval of CORS-045-23, the Town was notified by Jones Ag Services Limited that they were terminating their contract to provide winter control services in accordance with the terms and conditions of the contract. The contract was for six units with equipment and operators, with a possible extension for one additional unit.</p> <p>Due to timing, the Town approached Contractors currently providing winter control services to the Town to determine availability to provide additional equipment and operators for the upcoming 2023/2024 season. Associated Paving & Materials Ltd. had two units available, with equipment and operators, to provide winter control services for the 2023/2024 season. Associated Paving & Materials Ltd. agreed to hold their current rate. The Contractors did not have any further equipment available to the Town.</p>

Schedule I

	<p>Based on discussion with program staff and a review of the equipment utilization rates, the program area feels that there is sufficient capacity to manage the upcoming winter season. The amount of equipment requirements will be reviewed prior to the next tender expected to be issued in 2024.</p> <p>Staff processed PDA-095-23 utilizing Section 7.2.2 of the Purchasing By-law to award the contract increase to Associated Paving & Materials Ltd. in the estimated total amount of \$80,000 (exclusive of HST).</p>
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Financial Planning Section: Budget Impact (includes non-refundable HST)

Account Number(s)	0600/0900-0605/0665-3740
Account Description	Winter Maintenance -Town and Regional Roads
Project Total Budget	N/A
Contract Budget	\$315,256
Actual <small>(Net of HST)</small>	\$81,408
Variance <small>(Note 2)</small>	\$239,848 (F)
Funding Source	Operating Budget/Regional Recoveries

Note 1: Financial impact includes any non-refundable portion of HST.
 Note 2: Represents estimated impact over the 2023/24 season. Savings to budget are anticipated due to the above noted reduction of 5 units. However, contract costs will vary depending on weather conditions and will be monitored by program area staff, with any variances reported through the variance review processes.

REPORT TO COUNCIL FOR INFORMATION - CONTRACT INCREASE

Project Award	Reporting back to Council on the Delegated Authority to award the contract increase to Workday Limited in the amount of \$312,461 (exclusive of HST) for the implementation of Phase 2 of the Human Resource Information System.
Purpose of Report	As per Section 4.2.1 of the Purchasing By-law, a report to Council for information is required when the delegated authority provided in that section is utilized.
Background information	<p>Established through CORS-001-21 and subsequently awarded via competitive process through CORS-029-21, the Town successfully implemented Workday as its Human Resource Information System (HRIS). A master subscription agreement (MSA) was established in 2021 with Workday Limited along with a professional services agreement (PSA) that detailed the specific software modules that were included within Phase 1 of the Town's HRIS initiative. Phase 1 of this initiative launched internally in December 2022 and included the following modules identified as immediately required for ongoing Town operations and/or necessary for efficient Phase 1 product configuration:</p> <ul style="list-style-type: none"> • Employee Records • Time and Attendance • Leave Management • Organization and position management • Payroll administration • Benefits management • Onboarding and offboarding <p>It was determined that certain other modules were best suited for a future implementation phase in order to achieve the original project timelines.</p> <p>Following the successful launch of Workday Phase 1, a Statement of Work (SOW) for Phase 2 has been prepared along with proposed costing, which will result in the following three new modules being implemented:</p> <ul style="list-style-type: none"> • Scheduling • Advanced Compensation • Recruitment <p>The above modules were identified for Phase 2 based on priority of needs including the fact that the Town's current recruitment software (RecruitRight, by GHD Digital) is considered end of life (EOL) and will no longer be supported/available as of December 8, 2023. The Town's HRIS project team worked through the SOW and pricing in detail to confirm the proposal.</p> <p>Phase 1 of the project was awarded through CORS-029-21 in the amount of \$1,375,590 (exclusive of HST), following a competitive</p>

Schedule J

	<p>Request for Proposal No. 21-504. It was recommended that an increase to the contract in the amount of \$312,461 (exclusive of HST) be made to proceed with Phase 2.</p> <p>Timely execution of the Phase 2 SOW was required to achieve project timelines. Furthermore, to take advantage of a monetary incentive presented by the vendor, the Town was required to finalize and sign the updated SOW by July 28 2023. As a result, staff are using section 4.2.1 of the Purchasing By-law No. 061-2018 to proceed with the contract increase during the summer period.</p> <p>A capital budget (project C24012523) was approved through the 2023 budget process for the implementation of the subsequent HRIS phases, and the available funding accommodated the contract increase required for Phase 2.</p> <p>The annual operating subscription costs for Workday were outlined in staff report CORS-029-21. No further operating impacts will result from the implementation of these additional Phase 2 modules.</p> <p>Staff processed PDA-067-23 utilizing Section 4.2.1 of the Purchasing By-law to award the contract increase. This allowed for timely continuation of the project and favourable costing for the second phase.</p>
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Financial Planning Section: Budget Impact (Note 1)	
Account Number(s)	C24012523-A0260-7290
Account Description	Human Resource Information System
Project Total Budget	\$1,604,159
Contract Budget	\$514,000
Actual (Net of HST Rebate)	\$317,960
Variance (Note 2)	\$190,040 (F)
Funding Source	Project Variance Account

Note 1: Financial impact includes any non-refundable portion of HST

Note 2: The favourable variance was retained in the project pending completion of the Phase 2 initiative in order to accommodate any scope or resourcing changes that could impact overall project timelines or deliverables.

REPORT TO COUNCIL FOR INFORMATION – EMERGENCY PURCHASE

Project Award	Reporting back to Council on the Delegated Authority to rectify the emergency events in May 2022 and December 2022 to the air supported structure (dome) at St. Francis Xavier Catholic Secondary School, 1145 Bronte Street South, Milton
Purpose of Report	As per Section 11.1 of the Purchasing By-law, a report to Council for information is required when the delegated authority provided in that section is utilized.
Background information	<p>A partnership with Halton District Catholic School Board (HDCSB) was developed in 2012 to pursue the installation and operation of an air supported structure in coordination with the construction of St. Francis Xavier Secondary School. The dome was originally installed in late fall of 2013 and operated as the Milton Indoor Turf Centre since that time. The Town oversaw the operation of the facility including the installation and removal of the dome on a seasonal basis.</p> <p>On May 21, 2022, a wind storm caused the dome to deflate, damaging the lighting system and door systems. This was an intense storm with winds up to 190 km/h and caused extensive damage in the Region. The Town issued a contract to Farley Manufacturing Inc. for emergency repairs to the dome at a total cost of \$309,355.60 (exclusive of HST).</p> <p>On December 23, 2022, a major winter storm damaged the dome beyond repair. This event was reported to the Town's insurer and became an insurance claim. Insurance managed the claim, including the cost for the tear down and disposal of the dome. Through the insurance claim process, the Town recovered the net amount of \$1,293,541 through the insurer.</p> <p>Through COMS-004-23, Council approved the issuance of a Request for Proposal for the supply and installation of an air supported structure (dome) for indoor sports at the site of the existing Milton Indoor Turf Centre as well as the operation/finance of the dome. The Town's objective was to engage the services of a third-party to deliver indoor sports for the use of the community, without capital or operating costs to the Town. Through CORS-031-23, Council approved the award of the proposal for the Town (the lessor) to enter into a 21-year less one day lease agreement with Razor Management Inc. (the lessee) for a Seasonal Air Supported Structure and Dome Operator Services.</p>

Financial Planning Section: Budget Impact

The net insurance amount of \$1,293,541 covered the Town's costs of tear down and disposal, the impact of business interruption loss and provided for a cash value for the air dome, net of the Town's deductible. In accordance with the Town's Treasury Policy No. 116 the net impact from this settlement will be transferred to the Legal and Insurance Reserve so that the Town's net operating budget is not impacted.

REPORT TO COUNCIL FOR INFORMATION - PROPOSAL AWARD

Project Award	Reporting back to Council on the Delegated Authority to award Proposal No. 23-568 – Consulting Services for a Street Light and Pole Condition Assessment.
Recommendation	That the proposal award to R.V. Anderson Associates Limited to conduct a street light and pole condition assessment, in the amount of \$121,783 (exclusive of HST) be received for information.
Purpose of Report	As per CORS-056-23, a report to Council for information is required in relation to the delegated authority that was provided.
Background information	<p>Through CORS-056-23, Council approved the delegated authority to Staff to proceed with the award of the street light and pole condition assessment in the total estimated amount of \$387,420 (exclusive of HST) to ensure timely commencement of the assessment in order to meet the project timeline for completion.</p> <p>The competitive request for proposal process was subsequently finalized (as described below), and as such staff are reporting the results back to Council.</p> <p>Staff processed PDA-109-23 to award the proposal with the delegated authority that was provided. The contract total is \$121,783 (exclusive of HST).</p>
Purchasing Section: Bid Award Information	
Date bid issued	September 19, 2023
Advertisements	Town of Milton website
Closing Date	October 25, 2023
# of Plan takers	Ten (10)
Proposal Submissions received	<p>Proposals we received from the following companies:</p> <ol style="list-style-type: none"> 1. Arcadis Professional Services 2. HSN Engineering Inc. 3. Inversa Systems Ltd. 4. Parsways Inc. 5. Roth IAMS Ltd. 6. R.V. Anderson Associates Ltd.
Evaluation Criteria	<p>Proposals were evaluated based on the following criteria:</p> <ol style="list-style-type: none"> 1. Description of the Firm, Project Team and Structure (5 points) 2. Project Team Experience and References (15 points) 3. Understanding of the Project, including the Assessment of Project Risks (10 points) 4. Project Methods, Work Program, Tasks and Deliverables (30 points) 5. Project Scheduling (10 points) 6. Proposal Cost (30 points)

	An evaluation team with representation from Development Services evaluated the proposals against the established criteria and R.V. Anderson Associates Ltd. was deemed the highest scoring proponent.
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Financial Planning Section: Budget Impact (includes non-refundable HST)	
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Account Number(s)	C41000123-N0650-7290
Account Description	Street Light Inventory and Condition Assessment
Project Total Budget	\$451,720
Contract Budget	\$394,239
Actual (Net of HST Rebate) (Note 1)	\$123,926
Variance (Note 2)	\$270,313 (F)
Funding Source	Project Variance Account

Note 1: Contract actuals are an estimate only and will vary based on total number of street lights.

Note 2: Of the total favourable variance of \$270,313, \$50,000 was retained in the project to accommodate unanticipated costs associated with the work. The remaining amount of \$220,313 was returned to the Project Variance Account in accordance with PDA-109-23 and therefore not included as part of Schedule A to this purchasing various report.

**COUNCIL AUTHORITY FOR CONTRACT AWARDS
DELEGATED AUTHORITY**

Project Award	Reporting back to Council on the Delegated Authority for the single source contract award to Pinchin Ltd. for Asbestos Assessments of Town Facilities
Purpose of Report	Staff are reporting back on the delegated authority provided in CORS-056-23.
Background information	<p>On CORS-056-23, Council approved the delegated authority to Staff to proceed with the single source contract award to Pinchin Ltd. to undertake Asbestos Assessments of Town Facilities.</p> <p>The work is required to satisfy the new Public Sector Accounting Standards related to Asset Retirement Obligations. The need for a more detailed assessment of potential sources of asbestos at Town facilities (and related abatement costs) was identified and will supplement the data gathered as part of the Town's recent condition assessment update for facilities. The work will produce details that help the Town satisfy the PS 3280 requirements.</p> <p>Given the required timing of the work relative to the Town's year end and audit process, staff awarded a contract to Pinchin Ltd. to initiate the work on a timely basis. Pinchin Ltd. offers both expertise in hazardous materials such as asbestos, as well as familiarity with the accounting standard requirements of PSAB 3280. Pinchin Ltd. has also recently completed a similar assessment for Halton Region.</p> <p>Following the approval of delegated authority by Council, Pinchin Ltd. submitted a proposal for the facilities identified as requiring a full assessment. Staff reviewed the proposal and were satisfied with the work plan and cost received.</p> <p>Staff processed PDA-110-23, and awarded a contract to Pinchin Ltd. to complete the Asbestos Assessments of Town Facilities in the total amount of \$28,705 (exclusive of HST).</p>

Financial Planning Section: Budget Impact (includes non-refundable HST)

Account Number(s)	C20112023-N0250-7290
Account Description	PSAB Legislative Changes
Project Total Budget	\$30,900
Contract Budget	\$15,000
Actual (Net of HST)	\$29,210
Variance	\$14,210 (U) (Note 2) Project Variance Account

Funding Source

Note 1: Financial impact includes any non-refundable portion of HST

Note 2: A required budget increase in an amount of \$14,210 was addressed through PDA-110-23 and therefore not included as part of Schedule A to this purchasing various report.

REPORT TO COUNCIL FOR INFORMATION - SINGLE SOURCE AWARD

Project Award	Reporting back to Council on the Delegated Authority for the single source award to Royal Lepage Meadowtowne Realty (Phil Prestidge) in the upset amount of \$50,000 (exclusive of HST) to provide Real Estate Services
Purpose of Report	As per Section 7.2.2 of the Purchasing By-law, a report to Council for information is required when the delegated authority provided in that section is utilized.
Background information	<p>The Town awarded a contract for Real Estate Services to Royal Lepage Meadowtowne Realty (Phil Prestidge) through RFP-097-15 for the term June 1, 2015 to May 31, 2020. This contract was utilized to buy, sell and/or lease real property and land required to meet the needs of the Town. Royal Lepage Meadowtowne Realty have continued to provide real estate consulting services to the Town on an as needed basis.</p> <p>Timely execution of a buyer agreement is required to complete the real estate services identified in confidential report ES-003-23. As a result, staff processed an internal report for a single source contract award to Royal Lepage Meadowtowne Realty (Phil Prestidge) in the upset amount of \$50,000.</p> <p>Staff processed PDA-106-23 utilizing Section 7.2.2 of the Purchasing By-law to Royal Lepage Meadowtowne Realty (Phil Prestidge) to provide Real Estate Services, in the upset amount of \$50,000 (exclusive of HST).</p>
Financial Planning Section: Budget Impact (Note 1)	
Account Number(s)	C59110023-A0260-7310
Account Description	Civic Precinct
Project Total Budget	\$1,500,000 (Note 2)

Note 1: Financial impact includes any non-refundable portion of HST

Note 2: The costs of the real estate consulting services can be accommodated within the above noted capital project budget.



The Corporation of the Town of Milton

Report To: Council

From: Andy Scott, Senior Director, Strategic Initiatives & Business Development

Date: December 18, 2023

Report No: ES-012-23

Subject: Post-secondary Supplementary Transit Service

Recommendation: **THAT staff be delegated the authority to negotiate the final terms of the agreements with Wilfrid Laurier University and Conestoga College for the provision of supplemental transit services, such that the incremental service cost is fully funded through the agreements.**

THAT the Senior Director, Strategic Initiatives & Business Development be delegated the authority to determine the final terms of the agreement, and make any necessary adjustments to the agreements, subject to input from the Town’s legal counsel.

THAT the Mayor and Town Clerk be delegated the authority to execute the final agreements, and any resulting amendments that may be required.

THAT the Manager of Purchasing and Supply Chain Management, in consultation with the Director, Transit Services, be delegated the authority to approve any revisions that may be required to the existing contract with Diversified Transportation Ltd. in order to enact the resulting transit service enhancements that are funded through agreements noted above.

EXECUTIVE SUMMARY

- Both Conestoga College and Wilfrid Laurier University will commence the provision of post-secondary academic programming across three temporary campus locations in 2024.
- The Town has reoriented existing transit resources to establish a conventional transit route which will link the three campus locations to the Milton Go Station and the 401 Park and Ride.

EXECUTIVE SUMMARY

- Town staff are negotiating a transit partnership with both academic institutions who wish to enhance the level of service currently proposed based on existing resources.
- This partnership will see both post-secondary partners make a financial contribution to supplement the planned service.
- The financial contributions are anticipated to fully offset any incremental costs of the additional transit service.
- Staff are seeking authority to executive the final negotiated terms and any subsequent amending agreements.

REPORT

Background

2024 will see the introduction of three new post-secondary campus locations across Milton as Conestoga College and Wilfrid Laurier University both begin to offer post-secondary academic programming in the community. With the introduction of these three campus locations, staff are anticipating an increased demand for local and inter-municipal public transit from a new post-secondary market population.

The locations of these new campus locations are:

- 8160 Parkhill Drive - (Conestoga College) Anticipated to open January 2024
- 433 Steeles Avenue East - (Conestoga College) Anticipated to open April/May 2024
- 555 Industrial Drive - (Wilfrid Laurier University) Anticipated to open in September 2024

At full enrollment, these locations have the potential to serve over 3,000 students collectively. In anticipation, the Town's Transit Services Division has worked closely with our academic partners to understand associated impacts with service delivery to and from these locations.

Given these locations are currently served exclusively by Milton Transit OnDemand service, it was necessary to assess the potential impact an additional 3,000 post-secondary students may have. Research conducted in 2019 by the University of Toronto ([StudentMove, 2019](#)) suggests that post-secondary students across the GTHA are high local and regional transit users with local transit mode split of 33%. This mode split is in line with the anticipated local transit demand anticipated by both Wilfrid Laurier University and Conestoga College in

Background

Milton. If this level of demand was realized, the OnDemand service currently operating to and from these locations would exceed its capacity.

To prepare for this, staff have reoriented resources to implement a new conventional, fixed-route service which will link Conestoga Colleges post-secondary campus locations with the 401 Park and Ride and Milton GO Station. This line will also have the capacity to provide conventional transit service to Wilfrid Laurier's Milton Academic Campus (555 Industrial Drive) which is scheduled to operate from September 2024 onwards. The service reallocation from Milton Transit OnDemand to a fixed-route was identified as a preliminary quick-win action within the Council Memo - Fare and Service Adjustments effective January 2, 2024 (Appendix A).

Discussion

Supplementary service

During transit planning discussions with Conestoga College and Wilfrid Laurier University, both institutions indicated a desire for a higher level of service than the Town's current resourcing would permit.

The Town's long term growth planning had not anticipated additional transit investments to this area of the community. Without the introduction of the post-secondary campuses in these locations, the existing OnDemand service was anticipated to be sufficient to service ridership demand.

Both institutions have now forecast that they will commence operating their first academic spaces on the Milton Education Village (MEV) in 2028, but have committed to offering academic programming in Milton within these interim campus locations.

Given that both institutions have indicated that these locations are temporary in nature while they concurrently develop their MEV campus locations, a transit partnership approach whereby both academic institutions supplement existing municipal resources with a financial contribution for the enhanced level of service they would like to achieve makes sense for all parties. Both institutions have indicated that they are open to this type of partnership. It is currently anticipated that as the MEV area develops, the Town of Milton will expand its transit service to that community, with the timing and form of service subject to future transit master plan updates and Council approvals.

Discussion

Town staff continue to negotiate with both institutions, and require authority from Council to execute the resulting agreements. It is anticipated that these partnership agreements would secure funding from both partners in exchange for an enhanced level of transit service to and from these campus locations. It is further anticipated that the duration of these agreements will be until 2028 to ensure continuity of service until the Milton Education Village campus is operational.

Both institutions have demonstrated a desire to have their student bodies consider a UPass model, whereby transit fees are built into the tuition costs of every post-secondary student enrolled in Milton. This approach would need to be approved by each institutions Student Union and/or association. If successful, however, this has the potential to increase the transit revenues and may permit further investments into the overall public transit system. The timeline for consideration of the UPass model by each student body is unknown at this time. Should the student bodies vote to adopt the UPass model, this would require the negotiation of a new service level agreement which would remain in affect as both institutions transition over to the Milton Education Village campus.

Financial Impact

Execution of the negotiated agreements with Wilfrid Laurier University and Conestoga College will provide a direct source of revenue to supplement transit service to the post-secondary campus locations. The revenue provided through the negotiated financial agreements is anticipated to fully offset the incremental cost of the supplementary level of service that is requested by the academic institutions. As such, there is no net financial impact expected to the Town as a result of this process.

If the recommendations herein are approved, following the execution of these agreements staff will also make the required updates to the service agreement with the Town's third-party transit provider, Diversified Transportation Ltd., in order to implement the enhanced serviced.

The revenues and expenditures realized in relation to the expanded service will be reported in accordance with the Town's Budget Management Policy (Policy 113).

Respectfully submitted,

Andy Scott
Senior Director, Strategic Initiatives & Business Development



For questions, please contact: Andy Scott

Phone: Ext. 2103

Attachments

Appendix A - Council Memo - Fare and Service Adjustments effective January 2 2024

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.



TOWN OF MILTON MEMO

TO: Mayor and Members of Council
FROM: Tony D'Alessandro, Director, Transit Services
CC: SMT
DATE: November 21, 2023
SUBJECT: Milton Transit Service and Fare Adjustments

The purpose of this memo is to inform Council of upcoming service and fare adjustments that will be in effect on January 2, 2024.

a. Service Adjustment

As highlighted in the 5-Year Service Plan Quick Wins Council memo distributed on October 31, Milton Transit will be implementing a service adjustment to the 401 Industrial Business Park area (Appendix 1). To effectively address current and anticipated demand from a new post-secondary market, a fixed route service will be restored replacing existing OnDemand service (and reallocated service hours) along Regional Road 25, High Point Drive and Park Hill Drive, with scheduled connections to/from:

- Conestoga College - Parkhill and Steeles campuses
- Regional Road 25 and Highway 401 Park-and-Ride area
- Milton GO Station

The **Route 1 - High Point** will be available on weekdays from 5:15 am - 7:30 pm, with service reverting back to Milton Transit OnDemand after 7:30 pm and all-day on Saturdays. Public communication about this service will be ongoing using a variety of channels, starting the end of November and throughout the winter months.

b. Fare Adjustment

Transit fares are collected to help mitigate the costs of operating and maintaining transit services, balancing the proportion of municipal subsidy and passenger contribution in an affordable, fair and sustainable manner. As part of the annual User Fee By-law Update (CORS-038-23), staff recommended an average 7% increase across all cash and fare

products effective January 2, 2024 (Table 1). Information about the fare increase will be communicated publically starting late November and throughout the coming months.

Table 1. 2024 Milton Transit Fares, Effective January 2, 2024

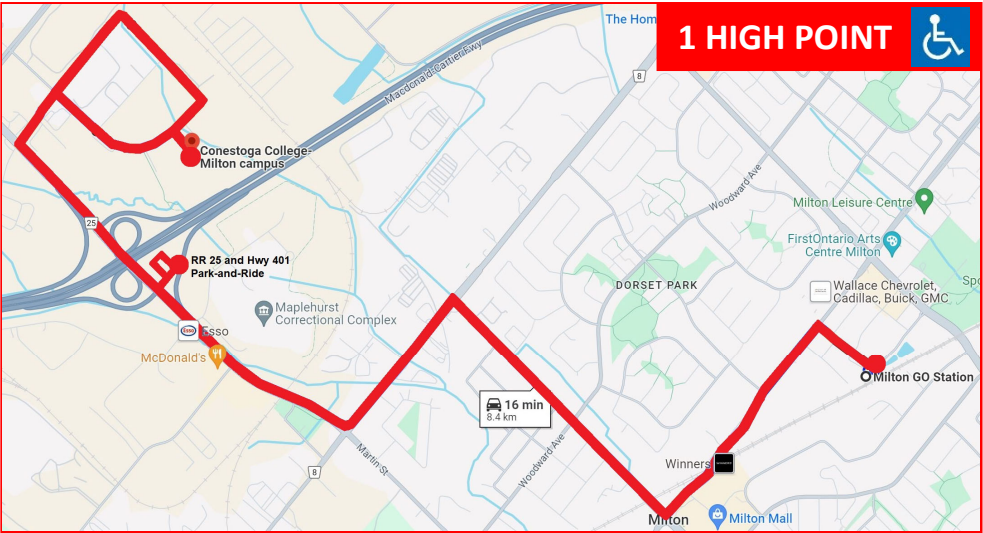
	Current	Effective January 2, 2024	% Increase
Adult Fare (20-64)			
Cash	\$ 4.00	\$ 4.25	6%
Tickets, sheet of 10	\$ 32.00	\$ 34.00	6%
Monthly Pass (unlimited use)	\$ 85.00	\$ 91.00	7%
Senior Fare (65+)			
Cash	\$ 4.00	\$ 4.25	6%
Tickets, sheet of 10	\$ 22.00	\$ 23.00	5%
Monthly Pass (unlimited use)	\$ 54.00	\$ 57.00	6%
Youth Fare (13-19)			
Cash	\$ 4.00	\$ 4.25	6%
Tickets, sheet of 10	\$ 23.00	\$ 25.00	9%
Monthly Pass (unlimited use)	\$ 63.00	\$ 68.00	8%
Post-Secondary - Full Time Enrollment			
Semester Pass (4 months, unlimited use)	N/A	\$ 273.00	
Child Fare (0-12)			
	Free	Free	0%
CNIB Card Holder			
	Free	Free	0%
Transfer Policy			
	universal, 2 hour	universal, 2 hour	

To support the launch of post-secondary programming for Conestoga students in 2024, Milton Transit will be introducing a four (4) month semester pass. The purpose of this product is to provide full-time students with an affordable and convenient transit solution, with the aim to enhance mobility within the campus community and throughout the Town. The pass will be available in December through the Token Transit mobile/e-ticketing platform.

If you have any questions about this memo, please contact Tony D'Alessandro, Director, Transit Services, 905-878-7252 x2548, tony.dalessandro@milton.ca.

Appendix 1. Route 1 High Point, effective January 2, 2024

1 HIGH POINT									
Northbound to High Point; Conestoga-Parkhill					Southbound to Milton GO				
DEPART Milton GO	Ontario & Steeles	Hwy 401 Park-and-Ride	RR 25 & High Point	ARRIVE Conestoga- Parkhill	DEPART Conestoga-Parkhill	RR 25 & High Point	Hwy 401 Park-and-Ride	Steeles & Ontario	ARRIVE Milton GO
MONDAY TO FRIDAY									
5:27	5:33	5:38	5:41	5:43	5:46	5:48	5:51	5:56	6:02
5:47	5:53	5:58	6:01	6:03	6:06	6:08	6:11	6:16	6:22
6:07	6:13	6:18	6:21	6:23	6:26	6:28	6:31	6:36	6:42
6:27	6:33	6:38	6:41	6:43	6:46	6:48	6:51	6:56	7:02
6:47	6:53	6:58	7:01	7:03	7:06	7:08	7:11	7:16	7:22
7:07	7:13	7:18	7:21	7:23	7:26	7:28	7:31	7:36	7:42
7:27	7:33	7:38	7:41	7:43	7:46	7:48	7:51	7:56	8:02
7:47	7:53	7:58	8:01	8:03	8:06	8:08	8:11	8:16	8:22
8:07	8:13	8:18	8:21	8:23	8:26	8:28	8:31	8:36	8:42
8:27	8:33	8:38	8:41	8:43	8:46	8:48	8:51	8:56	9:02
8:47	8:53	8:58	9:01	9:03	9:06	9:08	9:11	9:16	9:22
9:07	9:13	9:18	9:21	9:23	9:26	9:28	9:31	9:36	9:42
9:27	9:33	9:38	9:41	9:43	9:46	9:48	9:51	9:56	10:02
9:50	9:56	10:01	10:04	10:06	10:09	10:11	10:14	10:19	10:25
10:30	10:36	10:41	10:44	10:46	10:49	10:51	10:54	10:59	11:05
11:10	11:16	11:21	11:24	11:26	11:29	11:31	11:34	11:39	11:45
11:50	11:56	12:01	12:04	12:06	12:09	12:11	12:14	12:19	12:25
12:30	12:36	12:41	12:44	12:46	12:49	12:51	12:54	12:59	13:05
13:10	13:16	13:21	13:24	13:26	13:29	13:31	13:34	13:39	13:45
13:50	13:56	14:01	14:04	14:06	14:09	14:11	14:14	14:19	14:25
14:30	14:36	14:41	14:44	14:46	14:49	14:51	14:54	14:59	15:05
14:40	14:46	14:51	14:54	14:56	14:59	15:01	15:04	15:09	15:15
15:00	15:06	15:11	15:14	15:16	15:19	15:21	15:24	15:29	15:35
15:20	15:26	15:31	15:34	15:36	15:39	15:41	15:44	15:49	15:55
15:40	15:46	15:51	15:54	15:56	15:59	16:01	16:04	16:09	16:15
16:00	16:06	16:11	16:14	16:16	16:19	16:21	16:24	16:29	16:35
16:20	16:26	16:31	16:34	16:36	16:39	16:41	16:44	16:49	16:55
16:47	16:53	16:58	17:01	17:03	17:06	17:08	17:11	17:16	17:22
17:07	17:13	17:18	17:21	17:23	17:26	17:28	17:31	17:36	17:42
17:32	17:38	17:43	17:46	17:48	17:51	17:53	17:56	18:01	18:07
17:52	17:58	18:03	18:06	18:08	18:11	18:13	18:16	18:21	18:27
18:12	18:18	18:23	18:26	18:28	18:31	18:33	18:36	18:41	18:47
18:32	18:38	18:43	18:46	18:48	18:51	18:53	18:56	19:01	19:07
18:52	18:58	19:03	19:06	19:08	19:11	19:13	19:16	19:21	19:27



Miltontransit.ca
905-864-4141



THE CORPORATION OF THE TOWN OF MILTON

NOTICE OF MOTION

INTRODUCTION DATE: December 18, 2023

SUBJECT: Waive Rules of Procedure to Permit NOM Consideration at Council Meeting

CONSIDERATION DATE: December 18, 2023

MOVED BY: Councillor Ali

SECONDED BY: Councillor Malboeuf

WHEREAS Procedure By-law 007-2019, provides that Notices of Motion shall not be discussed or debated upon introduction, but shall be included on the next regular Council meeting agenda for consideration;

AND WHEREAS Section 7.9.3 of the Town of Milton Procedure By-Law 007-2019, as amended, permits a Notice of Motion to be considered upon its introduction by an affirmative vote of two-thirds of the Members present;

AND WHEREAS it is deemed impractical or not in the best interests of the Town of Milton to delay consideration;

THEREFORE BE IT RESOLVED THAT the pertinent rules contained in Section 7.9 of Procedure By-law 007-2019, be waived to permit the introduction and consideration by Council of the Notice of Motion on the Council agenda pertaining to the Support for Halton Police Board Resolution re: Auto Theft in Canada.



THE CORPORATION OF THE TOWN OF MILTON

NOTICE OF MOTION

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SUBJECT: Waive Rules of Procedure to Permit NOM Consideration at Council Meeting

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THE CORPORATION OF THE TOWN OF MILTON

BY-LAW NO. 092-2023

BEING A BY-LAW TO AMEND BY-LAW NO. 1984-1, AS AMENDED, BEING A BY-LAW TO REGULATE TRAFFIC AND PARKING ON HIGHWAYS UNDER THE JURISDICTION OF THE TOWN OF MILTON

WHEREAS the Council of the Corporation of the Town of Milton deems it expedient to amend By-law No. 1984-1, as amended, being a By-law to regulate traffic and parking on highways under the jurisdiction of the Town of Milton;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Schedule 13, Section 7 (2) – INTERSECTIONS – STOP SIGNS to By-law No. 1984-1 is as amended as described in Schedule “1” to this By-law;
2. **THAT** Schedule 16, Section 9 (1)(a) – U-TURNS – SIGNS ON DISPLAY to By-law No. 1984-1 is as amended as described in Schedule “2” to this By-law;
3. **THAT** Schedule 16, Section 9 (1)(a) – U-TURNS – SIGNS ON DISPLAY to By-law No. 1984-1 is as amended as described in Schedule “3” to this By-law;
4. **AND THAT** this By-law shall come into full force and effect when the appropriate signs have been erected and are on display.
5. **AND FURTHER THAT** all other provisions of By-law No. 1984-1, as amended, remain in full force and effect.

PASSED IN OPEN COUNCIL ON DECEMBER 18TH, 2023.

Gordon A. Krantz Mayor

Meaghen Reid Town Clerk

Schedule "1" To By-Law No. 092-2023

**SCHEDULE "13"
NON-CONNECTING LINK
SECTION 7(2)
INTERSECTIONS – STOP SIGNS**

TO BE DELETED

Column 1 Intersection	Column 2 Direction of Travel	Column 3 Stop On
Laurier Avenue and Commercial Street	Northbound Southbound Eastbound Westbound	Commercial Street Commercial Street Laurier Avenue Laurier Avenue

Schedule “2” To By-Law No. 092-2023

**SCHEDULE “16”
NON-CONNECTING LINK
SECTION 9(1)(A)
U-TURNS – SIGNS ON DISPLAY**

TO BE ADDED

Column 1 Highway(s)	Column 2 Direction Traveling From
Main Street East at Robarts Drive	Westbound
Fourth Line and Louis St Laurent Avenue	Eastbound / Westbound
Louis St Laurent Avenue and Leger Way	Eastbound

Schedule “3” To By-Law No. 092-2023

**SCHEDULE “16”
NON-CONNECTING LINK
SECTION 9(1)(A)
U-TURNS – SIGNS ON DISPLAY**

TO BE DELETED

Column 1 Highway(s)	Column 2 Direction Traveling From
Bronte Street South and Leger Way	Eastbound

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW NO. 093-2023

BEING A BY-LAW TO EXEMPT CERTAIN LANDS FROM PART LOT CONTROL PURSUANT TO SECTION 50 (7) OF THE *PLANNING ACT*, IN RESPECT OF LANDS DESCRIBED AS LOT 1 AND BLOCKS 84, 85, 86, 87 and 88 on R.P. 20M-1242 IN THE TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (PONY PINES DEVELOPMENT INC.) – FILE PLC-06/23

WHEREAS Section 50 of the *Planning Act*, R.S.O 1990, c. P.13, as amended, provides that no person shall convey part of any lot within a Plan of Subdivision;

AND WHEREAS Section 50(7) of the *Planning Act* provides for a Council to designate by by-law that Section 50 does not apply to certain lands within a registered plan of subdivision;

AND WHEREAS the Council of the Corporation of the Town of Milton deems it advisable to enact such a by-law to exempt Lot 1 and Blocks 83, 89, 90, 91, 92, 93 and 97; R.P. 20M-1242, from those provisions of the *Planning Act* dealing with part lot control;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Subsection 5 of Section 50 of the *Planning Act* does not apply to lands described as exempt Lot 1 and Blocks 84, 85, 86, 87 and 88; R.P. 20M-1242, and more particularly described in Schedule 'A' attached hereto and forming part of this by-law for the purpose of creating two (2) semi-detached units and twenty-seven (27) townhouse units.
2. **THAT** notwithstanding Section 1 of this by-law, this by-law shall expire 365 days from the passing thereof unless the Council of the Corporation of the Town of Milton has provided an extension by amendment to this by-law prior to its expiry.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

Gordon A. Krantz Mayor

Meaghen Reid Town Clerk

SCHEDULE 'A' TO BY-LAW NO. 093-2023

Legal Description

ALL AND SINGULAR those certain parcels or tracts of land and premises situate, lying and being in the Town of Milton, in the Regional Municipality of Halton in the Province of Ontario and comprising Lot 1 and Blocks 84, 85, 86, 87 and 88 on R.P. 20M-1242, and being more particularly described as follows:

All of Lot 1, Registered Plan 20M-1242, designated as Parts 1 to 4 inclusive, on Reference Plan 20R-22545.

All of Block 84, Registered Plan 20M-1242, designated as Parts 5 to 18 inclusive, on Reference Plan 20R-22545.

All of Block 85, Registered Plan 20M-1242, designated as Parts 19 to 30 inclusive, on Reference Plan 20R-22545.

All of Block 86, Registered Plan 20M-1242, designated as Parts 1 to 12 inclusive, on Reference Plan 20R-22544.

All of Block 87, Registered Plan 20M-1242, designated as Parts 13 to 21 inclusive, on Reference Plan 20R-22544.

All of Block 88, Registered Plan 20M-1242, designated as Parts 22 to 34 inclusive, on Reference Plan 20R-22544.

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW NO. 094-2023

BEING A BY-LAW TO EXEMPT CERTAIN LANDS FROM PART LOT CONTROL PURSUANT TO SECTION 50 (7) OF THE *PLANNING ACT*, IN RESPECT OF LANDS DESCRIBED AS BLOCK 143 on R.P. 20M-1246 IN THE TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (MATTAMY (BROWNBRIDGE) HOMES.) – FILE PLC-07/23

WHEREAS Section 50 of the *Planning Act*, R.S.O 1990, c. P.13, as amended, provides that no person shall convey part of any lot within a Plan of Subdivision;

AND WHEREAS Section 50(7) of the *Planning Act* provides for a Council to designate by by-law that Section 50 does not apply to certain lands within a registered plan of subdivision;

AND WHEREAS the Council of the Corporation of the Town of Milton deems it advisable to enact such a by-law to exempt Block 143; R.P. 20M-1246, from those provisions of the *Planning Act* dealing with part lot control;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Subsection 5 of Section 50 of the *Planning Act* does not apply to lands described as exempt Block 143; R.P. 20M-1246, and more particularly described in Schedule 'A' attached hereto and forming part of this by-law for the purpose of creating six (6) townhouse units.
2. **THAT** notwithstanding Section 1 of this by-law, this by-law shall expire 365 days from the passing thereof unless the Council of the Corporation of the Town of Milton has provided an extension by amendment to this by-law prior to its expiry.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

Gordon A. Krantz Mayor

Meaghen Reid Town Clerk

SCHEDULE 'A' TO BY-LAW NO. 094-2023

Legal Description

ALL AND SINGULAR those certain parcels or tracts of land and premises situate, lying and being in the Town of Milton, in the Regional Municipality of Halton in the Province of Ontario and comprising Block 143 on R.P. 20M-1246, and being more particularly described as follows:

All of Block 143, Registered Plan 20M-1246, designated as Parts 1 to 16 inclusive, on Reference Plan 20R-22541.

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW NO. 095-2023

BEING A BY-LAW TO EXEMPT CERTAIN LANDS FROM PART LOT CONTROL PURSUANT TO SECTION 50 (7) OF THE *PLANNING ACT*, IN RESPECT OF LANDS DESCRIBED AS BLOCKS 149, 150, 158, 159, 160, 161 and 162 on R.P. 20M-1263 IN THE TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (MATTAMY (BROWNBIDGE) HOMES) – FILE PLC-08/23

WHEREAS Section 50 of the *Planning Act*, R.S.O 1990, c. P.13, as amended, provides that no person shall convey part of any lot within a Plan of Subdivision;

AND WHEREAS Section 50(7) of the *Planning Act* provides for a Council to designate by by-law that Section 50 does not apply to certain lands within a registered plan of subdivision;

AND WHEREAS the Council of the Corporation of the Town of Milton deems it advisable to enact such a by-law to exempt Blocks 149, 150, 158, 159, 160, 161 and 162; R.P. 20M-1263, from those provisions of the *Planning Act* dealing with part lot control;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Subsection 5 of Section 50 of the *Planning Act* does not apply to lands described as exempt Blocks 149, 150, 158, 159, 160, 161 and 162; R.P. 20M-1263, and more particularly described in Schedule 'A' attached hereto and forming part of this by-law for the purpose of creating thirty-four (34) townhouse units.
2. **THAT** notwithstanding Section 1 of this by-law, this by-law shall expire 365 days from the passing thereof unless the Council of the Corporation of the Town of Milton has provided an extension by amendment to this by-law prior to its expiry.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

Gordon A. Krantz Mayor

Meaghen Reid Town Clerk

SCHEDULE 'A' TO BY-LAW NO. 095-2023

Legal Description

ALL AND SINGULAR those certain parcels or tracts of land and premises situate, lying and being in the Town of Milton, in the Regional Municipality of Halton in the Province of Ontario and comprising Blocks 149, 150, 158, 159, 160, 161 and 162; R.P. 20M-1263, and being more particularly described as follows:

All of Block 149, Registered Plan 20M-1263, designated as Parts 1 to 14 inclusive, on Reference Plan 20R-22524.

All of Block 150, Registered Plan 20M-1263, designated as Parts 15 to 35 inclusive, on Reference Plan 20R-22524.

All of Block 158, Registered Plan 20M-1263, designated as Parts 1 to 12 inclusive, on Reference Plan 20R-22525.

All of Block 159, Registered Plan 20M-1263, designated as Parts 13 to 19 inclusive, on Reference Plan 20R-22525.

All of Block 160, Registered Plan 20M-1263, designated as Parts 20 to 28 inclusive, on Reference Plan 20R-22525.

All of Block 161, Registered Plan 20M-1263, designated as Parts 29 to 41 inclusive, on Reference Plan 20R-22525.

All of Block 162, Registered Plan 20M-1263, designated as Parts 1 to 9 inclusive, on Reference Plan 20R-22523.

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW NUMBER 096-2023

BEING A BY-LAW TO PROVIDE A RETENTION SCHEDULE FOR THE RECORDS OF THE TOWN OF MILTON AND TO REPEAL AND REPLACE BY-LAW NUMBER 107-2019

WHEREAS Section 254 (1) of the *Municipal Act 2001*, S.O. 2001, c. 25, as amended, provides that a municipality shall retain and preserve the records of the municipality and its local boards in a secure and accessible manner;

WHEREAS Section 255 (3) of the *Municipal Act 2001*, S.O. 2001, c. 25, as amended, provides that a municipality may establish retention periods during which the records of the municipality and local boards of the municipality must be retained and preserved in accordance with Section 254 thereof;

AND WHEREAS the Council of the Corporation of the Town of Milton deems it desirable to establish retention periods for the records of the municipality by enactment of a by-law;

NOW THEREFORE the Council of The Corporation of the Town hereby enacts as follows:

1. DEFINITIONS

- a) “**Archival**” shall mean a Record that has been appraised for permanent retention and archival selection because of its long, historical, legal, operational or administrative value;
- b) “**Council**” shall mean the Council for the Corporation of the Town of Milton;
- c) “**Destroy**” shall mean the process of eliminating or deleting data, documents and records so that the recorded information no longer exists;
- d) “**Disposition**” with respect to records” shall mean a range of processes associated with implementing records retention, destruction, loss, or transfer decisions or ownership that are documented in disposition authorities or other instruments;
- e) “**Information Governance and Records Manager (Manager)**” shall mean the individual designated by the Town Clerk who is authorized to act on behalf of the Town and entrusted for overall management of the information governance and records management program;
- f) “**Official records**” shall mean recorded information in any format or medium that documents the Town’s business activities, rights, obligations or

responsibilities or recorded information that was created, received, distributed or maintained as evidence and information by the Town in pursuance of legal obligations or in the transaction of business;

- g) **“Records management”** shall mean the field of management responsible for the efficient and systematic control of the creation, receipt, maintenance, use and disposition of records, including processes for capturing and maintaining evidence of and information about business activities and transactions in the form of records;
- h) **“Retention period”** shall mean the period of time that records are kept to meet operational, legal, regulatory, fiscal or other requirements by the Town before they may be disposed of;
- i) **“Retention schedule”** shall mean a document that describes the Town’s records at a series level, and indicates the length of time that each series shall be retained before its final disposition. It specifies those records to be preserved for their archival or legal value, and on a continuing basis, authorizes the destruction of the remaining records after the lapse of a specified retention period or the occurrence of specified actions or events. Records retention schedules serve as the legal authorization for the disposal of the Town’s records;
- j) **“Town”** shall mean The Corporation of the Town of Milton;
- k) **“Transitory records”** shall mean records kept solely for convenience of reference and of short-term value in documenting the planning or implementation of Town policy or programs

2. RETENTION SCHEDULE

- a) The records retention schedule attached hereto as Schedule “A” forms part of this By-law, and may be amended from time to time as necessary.
- b) The Information Governance and Records Manager shall administer this By-law and shall ensure that the retention periods set out in Schedule “A” attached hereto comply with all relevant legal requirements for records retention.
- c) In determining the retention periods for any records, the Manager shall consider, in consultation with other Town employees where appropriate:
 - i. the operational nature of the records, including the period of time during which the Township uses the records to perform its functions;
 - ii. the legal nature of the records, including the period of time necessary to comply with statutory or regulatory requirements or requirements imposed by agreements, permits or similar documents, or to ensure that the records are available in case of investigation or litigation;

- iii. the fiscal nature of the records, including the period of time necessary for audit or tax purposes; and
- iv. the historical nature of the records, including the long-term value of the records for documenting past events or the origins and history of the Town.

3. EMPLOYEE RESPONSIBILITIES

All Town employees who create, work with or manage records shall:

- a) ensure that official records in their custody or control are protected from inadvertent destruction or damage;
- b) ensure that transitory records in their custody or control are destroyed when they are no longer needed for short-term reference;
- c) destroy copy set of official records in their custody or control if the master set of records are being retained in accordance with Schedule "A" attached hereto.
- d) ensure that official records are properly classified and filed according to Schedule "A" of this By-law.

4. INFORMATION GOVERNANCE AND RECORDS MANAGER RESPONSIBILITIES

The Manager shall:

- a) develop, establish and administer policies and procedures for the Town's information governance and records management program;
- b) provide departments guidance on proper records disposition process to ensure official records are preserved or disposed of in accordance with Schedule "A" attached;
- c) review departmental official records disposition documentations and retain any necessary proof of the disposition (e.g. disposition authorization form, destruction certificate);
- d) guide the Town employees with best practices and provide adequate trainings;
- e) serve as subject matter expert for system design or process change;
- f) periodically review and make recommendations with respect to this By-law, including Schedule "A" attached hereto;
- g) liaison with Archive Ontario on its historical collection of the Town.

5. DEPARTMENT RESPONSIBILITIES

The management of the department shall:

- a) ensure that official records in its custody or control are preserved and disposed of in accordance with Schedule “ A” attached hereto;
- b) ensure its employees are following relevant policies, procedures and best practices;
- c) ensure that all dispositions of official records in its custody or control are properly authorized and documented;
 - i. departments shall initiate periodic review of official records in its custody or control and identify official records that have passed their retention period;
 - ii. the manager of the business unit shall review the inventory of such records and authorize the disposition, except:
 - 5.a.ii.1. when official records are misclassified;
 - 5.a.ii.2. when there are further business reasons for retaining such records;
 - 5.a.ii.3. when such records are pertaining to pending or active investigation or litigation.

6. EFFECT

This By-law will take effect on the date it is passed.

7. SHORT TITLE

This By-law shall be known as the “Records Retention By-law”.

8. REPEAL

By-law Numbers 014-2011, 102-2013, 114-2015 AND 107-2019 are hereby repealed in their entirety.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023

Gordon A. Krantz Mayor

Troy McHarg Town Clerk

A ADMINISTRATION (NON-FINANCIAL)

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
A00	Administration – General Includes administrative records which cannot be classified elsewhere including general correspondence, quarterly reports. Use only if no other heading is available.	Originating	1			
A01	Associations and Organizations Includes general correspondence, minutes, agenda, notices and reports regarding organizations and associations to which staff belong or with which they communicate in the course of their duties such as FCM, AMCTO, MISA, Ontario Farm Drainage Association, United Way, MMAH, GRCA, AMO, Chamber of Commerce, tag days, District School Boards, etc. Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence.	Originating	1	No	Only Release records that are already publically available	Excludes: Membership Fees - see F01
A02	Staff Committees and Meetings Includes records regarding the activities of staff committees and meetings. Includes notices of meetings, agenda, minutes, etc. May also include copies of staff activity reports.	Originating	4	No	Varies Depending on meeting topic, consult Legislative Services	Excludes: Council Minutes and Agenda - see C03-C04 Standing Committees – C05-C06
A02-01	Management Team Committees and Meetings Includes records from management team committees and meetings such as minutes, decision or guidance documents affecting the entire Town’s operations. For example: Strategic Management Team (SMT) and Leadership Management Team (LMT) Meetings	Mayor and CAO Office	P	No	Varies Depending on meeting topic, consult Legislative Services	
A03	Computer/Information Systems Computer hardware and systems assisting staff with their daily duties. Includes computer hardware, computer software, data transmission, system design and implementation, quality control and office automation.	Information Technology	E+3 E=End life of the system	No	Mostly Accessible, some systems may be considered security related	Excludes: Reports - file by subject. Acquisitions – see F18 Purchase Orders & Requisitions – see F17
A04	Conferences and Seminars Includes invitations, approvals, agenda, notes on proceedings, and other records regarding conferences, conventions, seminars and special functions attended by staff, or sponsored by the municipality as well as travel arrangements, accommodation, itineraries, reservations, confirmation of reservations, hotel brochures related to the conference, restaurants, convention sites etc.	Originating	1	No	Yes	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
A04-01	Conferences and Seminars hosted by Town of Milton Includes records for conferences, conventions, seminars and special functions hosted by Town of Milton	Originating	7	No	Yes	Excludes: Speeches and Presentations - see M08 Employee and Council Expenses - see F09 Ceremonies and Events - see M02 Invoices - see F01 Rental Agreements - see L14
A05	Consultants Includes correspondence, proposals, resumes and other documents regarding the selection, appointment and monitoring of consultants. May include similar records regarding legal solicitors and engineering firms.	Originating	2	No	Only records after consultant contract completed are accessible	Excludes: Deliverables - file by subject. Quotations and Tenders - see F18 Invoices - see F01
A06	Inventory Control Includes inventory statements and reports, and all other records regarding the control of supplies, fuel and small equipment stock levels.	Originating	6	No	Yes	Excludes: Assets - see F06
A07	Office Equipment and Furniture Includes records regarding the design and maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, photocopiers, printers, microfiche readers, etc.	Originating	E E=Disposal of asset	No	Yes	Excludes: Computer Hardware and Software - see A03. Service Agreements - see L14
A08	Office Services Includes records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, department mail logs, internal printing, and word-processing services.	Originating	1	No	Varies Depending on topic, consult Legislative Services	
A09	Policies and Procedures Includes departmental non-technical policy and procedure manuals, work instructions, protocols, guidelines and directives relating to administrative, governance and operational processes.	Originating	E+15 E=expiry date	No	Mostly accessible, procedures may be considered security related	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
A09-01	Town Policy Manual Includes corporate policies that are approved by Council.	Mayor and CAO Office	P	No	Yes	
A09-02	Policies and Procedures Development Files Includes background files, key comments and feedback and legal opinion to form the policy or procedure.	Originating	E E=expired/revision	No	No	
A10	Records Management Includes information regarding the management of corporate records, regardless of medium. Specific records include file listings, feasibility studies, and records centre operations.	Legislative and Legal Services	E E= Updated	No	Mostly Accessible, some files may describe private documents	Excludes: Retention By-Law - see C01 Policies and Procedures - see A09 Records Disposition - see A11 Training – see H12
A11	Records Inventory and Disposition Includes records regarding the inventory and disposition of municipal records (disposition means destruction, transfer or archive). Includes the disposal method used and forms authorizing and describing the destruction of records, file listings, classification structures etc.	Originating	P	No	Yes	
A12	Telecommunications Systems Includes records regarding all types of telecommunications systems. Includes telephone systems, facsimile machines, base and mobile stations, towers, antennae, police and fire communications systems, and 911 emergency systems.	Information Technology Fire	E E=Replacement of the system	No	No	Excludes: Licenses - see P09 Assets - see F06 Long Distance Call Records - see F01 Agreements - see L04 or L14
A13	Travel and Accommodation Includes records regarding travel and accommodation arrangements. Includes itineraries, maps, authorizations, reservations, rented vehicles and catalogues and brochures concerning hotels, convention sites and restaurants.	Originating	1	No	Mostly Accessible, may contain confidential payment information	Excludes: Employee and Council expenses – see F09
A14	Uniforms and Clothing Includes records regarding uniforms and special clothing used by municipal staff members, such as uniforms, firefighters' clothing and safety clothing.	Originating	E E=disposal of the item	No	No	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
A15	Vendors and Suppliers Includes records regarding vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidders' information sheets.	Originating	3	No	Mostly not accessible, contains third party information	Excludes: Purchase Orders and Requisitions - see F17 Office Equipment - owned and leased - see A07 Fleet Management - see V01
A16	Intergovernmental Relations (Use only if no other headings are available) Includes correspondence and other records of a general nature regarding the relationship between the municipality and all other levels of government (such as telephone numbers, contact names, etc.). May include correspondence to and from Boards and Commissions. Where possible, these records should be filed by their subject, not the originator or recipient of the report and/or correspondence.	Originating	5	No	Varies Depending on topic, consult Legislative Services	Excludes: Risk Management Files - see L02
A17	Information Access And Privacy Includes records regarding the municipality's responsibilities under the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) and records regarding the handling of requests under the Act. Includes routine disclosure requests and processing, notices of disclosure, responses to FOI request made to the municipality, access request transfers to another institution, FOI requests made by the municipality, notices of appeal and privacy breach investigation/remedy.	Legislative and Legal Services	E+2 E=close of the request/resolution of a breach	Yes	Limited correspondence and records release	Excludes: Policy – see A09 Training – see H12 IPC appeals/complaints – see L01
A18	Security Includes reports, requests, logs, and other records regarding the security of offices/facilities and properties such as security passes and control of keys.	Community Services Fire	5	No	No	Excludes: Vandalism Reports - see P05 Computer Security - see A24
A18-01	Closed-circuit television (CCTV) output for Surveillance (non –investigative related)	Community Services Fire	30 days	No	Requests for own personal information only	
A18-02	Closed-circuit television (CCTV) output for Surveillance (investigative related)	Community Services Fire	3	No	Requests for own personal information only	
A19	Facilities Construction and Renovations	Community Services	E+5	No	Mostly accessible, except for building security information	Excludes: Specifications of the facilities – see A27

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes records for the planning and construction of municipal facilities such as fire stations, pools, and office buildings. Includes site meetings, consultant's reports, and cost reports. Also includes architectural and engineering drawings.		E=Completion of projects with no issues			
A20	Building and Property Maintenance Includes records regarding the maintenance of the municipality's buildings and properties, such as parks and trails, bus terminals, garages, libraries, and office buildings. Includes exterior maintenance to buildings, landscaping, grounds keeping and grass cutting. Also includes interior design of buildings, including floor layouts and office cleaning.	Community Services Engineering Services	5	No	Mostly accessible, except for building security information	Excludes: Recreational Facilities - see R05
A21	Facilities Bookings Includes copies of permits and bookings issued for the rental of recreational and administrative facilities for specific activities. Also includes any associated third party insurance policies.	Community Services	3	Yes	Restricted to your own personal booking or de-identified bookings	
A22	Accessibility of Buildings/Services Includes records relating to the accessibility of Town buildings, facilities, programs and services. Includes presentations, correspondence and planning.	Legislative and Legal Services	P	No	Yes	Excludes: Facilities Construction & Renovations – see A19 Policies & Procedures – see A09
A23	Information Systems Production Activity & Control Includes records relating to computer system operations and backup tapes. Includes activity logs, help desk tickets, change control sheets, change order, file access control reports and system changes.	Information Technology	3	No	Varies by activity, limited to de-identified summary data on some topics	
A24	Access Control and Passwords Includes records related to the management of and access to programs. Includes individual access, password management, etc.	Information Technology	E E=revoke of access/change of password	No	No	
A25	Performance Management/Quality Assurance Includes records regarding the performance of the municipality as a corporation such as service reviews. Types of records included would be reports, statistical analysis, program documentation, correspondence, awards for outstanding organizational achievements, work plans, etc.	Mayor and CAO Office	P	No	Yes	Excludes: Employee performance appraisal – see H03 Council Goals & Objectives – see C08

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
						Financial Regulatory reporting – see F27
A26	<p>Building Structure Systems</p> <p>Includes records regarding building systems that are part of the building structure such as HVAC, ventilation, fire and life systems, electrical safety, elevators, furnace, and emergency lighting. Includes manufacturer’s operation/technical manuals and warranties; various inspection and testing reports; approved life safety studies, approved compliance equivalencies, inspection log books and remedial action for building systems.</p> <p>Note: Quality assurance logs, salt logs, pool readings, ice measurements, maintenance logs, first aid checks, fire extinguisher check, emergency light check, flood logs, refrigeration readings, alcohol event logs.</p>	Community Services	<p>E</p> <p>E= End life of the system</p>	No	No	
A27	<p>Drawings and Specifications</p> <p>Includes architectural and engineering drawings and As-Built drawings and supporting documentation such as specifications required to interpret the drawings and identify the current state of a facility or infrastructure for assessment, rehabilitation and warranty support purposes.</p>	Originating	<p>E</p> <p>E= End life of the facility or infrastructure</p>	No	No	

P – Permanent E - Event

C COUNCIL, BOARDS & BY-LAWS

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
C00	Council and By-Laws – General Includes records regarding Council, Boards and by-laws which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1	No	Yes	
C01	By-Laws Includes final versions of the municipality's by-laws and amendments and attachments that are legally part of the by-laws.	Legal and Legislative Services	P	No	Yes, must be made publically available	Excludes: Background information – see C01-01
C01-01	By-Law Background File Include any background and supporting documentation required to explain or justify the By-Law.	Originating	P	No	No	
C03	Council Meeting Agendas and Meeting Packages Council meeting packages including notice of meetings, agendas, delegates information and reports/ presentations as well as working notes used in agenda preparation.	Legal and Legislative Services	P	No	Yes, must be made publically available	
C04	Council Minutes Includes minutes of the proceedings of Council meetings. Includes attachments to the minutes.	Legal and Legislative Services	P	No	Yes, must be made publically available	Excludes: Standing Committees or Boards - see C05, C06 Reports to Council - see C11
C05	Council Committees/ Boards Meeting Agenda and Package Includes notices of meetings and agenda for the committees of Council as well as working notes used in agenda preparation, including both standing and advisory committees/Boards.	Originating	P	No	Yes, must be made publically available	
C06	Council Committee/ Boards Minutes Includes minutes of the committees of Council and copies of Local Board Minutes that members of Council belong to, including both standing and advisory committees/Boards.	Originating	P	No	Yes, must be made publically available	
C07	Elections Includes returned notices, lists of officials, initial MPAC and amended voters' lists, change of name applications, nominations, notices, election results, preliminary voters' lists, objections lists, candidate compliance reports, third party campaign financial and auditor reports, election report, election coordination documentation, oaths taken by council members and information on ward boundaries. Includes advertising.	Legal and Legislative Services	E E=Declaration of results for next election	Yes	Final results, reports, nomination papers, financial statements	Financial Statemts must be kept for 4 years after completion of next election

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
C07 – 01	Ballots and any other documents and materials related to the election. Including election ballots, voters lists. MEA Section 88	Legal and Legislative Services	E + 120 days E=declaration of results, if no recount	No	No	
C07-02	Ward Boundary Review Includes records related to electoral wards, including ward boundary reviews.	Legal and Legislative Services	P	No	Final reports must be made available	
C08	Goals and Objectives Includes records concerning strategic planning, goals and objectives, and mission statements.	Mayor and CAO Office	E+10 E= new goals and objectives	No	Final reports must be made available	
C09	Motions and Resolutions Includes final signed versions of resolutions and motions of Council.	Legal and Legislative Services	P	No	Yes, must be made publically available	
C11	Staff Reports to Council and Standing Committees Includes all final reports to Council and Standing Committees.	Legal and Legislative Services	P	No	Final reports must be made available	
C12	Appointments to Boards and Committees Includes records regarding appointments by Council of staff and council members.	Legal and Legislative Services	P	No	Yes, must be made publically available	
C13	Accountability Transparency & Governance Includes records relating to Council Code of Conduct complaints and related investigations, Integrity Officer appointments and reports (including Integrity Commissioner reports, Ombudsman investigations and reports), closed meeting investigations and initiatives etc.	Legal and Legislative Services	2	No	Commissioner Final Reports Only	
C14	Strong Mayor Powers and Duties Includes records documenting decisions/approvals, associated deliberations and directives to staff issued by the Mayor	Legal and Legislative Services	P	No	Only what is already publically available	

P – Permanent E - Event

D DEVELOPMENT & PLANNING

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
D00	Development and Planning - General Includes records regarding development and planning which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1	No	No	
D01	Demographic Studies Includes records regarding trends in population growth, census reports, and density studies. Also includes records regarding the type, level and rate of growth of employment, unemployment statistics, composition of the workforce, etc.	Planning and Development	10	No	Available once finalized	Excludes: Vital Statistics - see L12
D02	Economic Development Includes records regarding the growth of the economy. Includes studies, statistics, projections etc.	Economic Development	10	No	Available once finalized	Excludes: Demographic Studies - see D01 Residential Development - see D04 Tourism Development - see D06 Industrial/Commercial Development - see D21
D03	Environment Planning Includes records regarding general types of environmental studies with a long range planning emphasis, such as salt usage impact, storm drainage and flood control, parks and open spaces, water sustainability and conservation, pollution prevention and waste management planning. Also contains information on invasive species and source water protection such as risk assessments, well development and purging, risk management plans, site condition reports and information prepared for Phase One and Phase Two environmental assessments.	Planning and Development	15	No	Available once finalized	
D04	Residential Development Includes records about monitoring house supply and implementing regional planning policies.	Planning and Development	10	No	Available once finalized	
D05	Natural Resources Planning Includes records about implementing provincial/municipal planning authorities' planning policies for the management and preservation of forests and other natural features such as Niagara Escarpment Commission.	Planning and Development	10	No	Available once finalized	
D07	Condominium Plans	Planning and Development	P	No	Mostly accessible, except for building security information	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Records regarding the pre-consultation and approval of plans of condominiums. Includes pre-consultation reports, signed draft plan, supporting consultants' reports, subdivision agreement, CDM Plan, and registered R Plans, technical reports and other legal documents.	Engineering Services				
D07-01	Background information for condominium plans Background information regarding the pre-consultation and the approval of plans of condominiums. Includes correspondence, written comments, working notes, and any other background information.	Planning and Development Engineering Services	E E= Expiry of appeal period or OMB decision for final approval	No	Mostly accessible, except for building security information	
D08	Official Plans Includes the official plan and exemptions and amendments to the official plan. Also includes secondary plans and amendments, containing detailed objectives and policies concerning the planning, development, and redevelopment of specific planning districts.	Planning and Development	P	No	Yes	Excludes: Official Plan Amendment Applications - see D09 Background Reports – see D24
D09	Official Plan Amendment Applications Records regarding to the applications to amend the official plan or secondary plans, including applications, staff reports, the amendment, the by-law pertaining to the amendment, supporting consultants' reports, plans and drawings	Planning and Development	E+10 E=Final Decision or reflected in revised official plan	No	Yes	
D09-01	Background Information for Official Plan Amendment Applications Records regarding to the pre-consultation and applications of the official plan or secondary plan amendments including comments and feedbacks on the application, workings notes and any other background information.	Planning and Development	E E= Expiry of appeal period or when OMB renders a decision	No	No	
D10	Severances Records regarding the granting of severances to parcels of land including application for severance, planner's comments, original consent sketch, final decision (including OMB Order, if applicable), deposited R Plan, signed certificate of consent, registration details, registered common ownership agreement, supporting consultants' reports.	Planning and Development	P	No	Yes	
D10-01	Background Information for Severances Background records regarding the granting of severances to parcels of land including workings notes and any other background information.	Planning and Development	E E=land titles registration with no outstanding issues			

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
D11	<p>Site Plan Control</p> <p>Records regarding to the approval for the provision of services to individual land sites including water, sewage and utility approvals, as well as parking areas, drainage and driveways.</p> <p>Includes application form, executed site plan agreement, registration details, supporting consultants' reports, approved plans and drawings, as built plans, survey, photometric plan(s).</p>	<p>Planning and Development</p> <p>Engineering Services</p>	P	No	Limited to information that does not endanger site security	Excludes: Site Plan Agreements - see L04
D11-01	<p>Background Information for Site Plan Control</p> <p>Background records regarding the approval for the provision of services to individual land sites including general correspondences, workings notes and any other background information.</p>	<p>Planning and Development</p> <p>Engineering Services</p>	E E= release of entire letter of credit	No	No	
D12	<p>Subdivision Plans</p> <p>Includes records regarding the pre-consultation and the approval of plans of subdivisions (both residential and commercial / industrial). Includes schedule of approval, official notice of registration, conditions of draft plan, signed draft plan, supporting consultants' reports, subdivision agreement, M Plan, and registered R Plans, drawings, technical report.</p>	<p>Planning and Development</p> <p>Engineering Services</p>	P	No	Limited to information that does not endanger site security	Excludes: Subdivision Agreements – See L04
D12-01	<p>Background Information for Subdivision Plans</p> <p>Records regarding to the pre-consultation and applications of the official plan or secondary plan amendments including general correspondence, written comments, working notes and background information.</p>	<p>Planning and Development</p> <p>Engineering Services</p>	E E= Expiry of appeal period or when OMB renders a decision	No	Limited to information that does not endanger site security	
D12-02	<p>Assumption Folder</p> <p>Includes records regarding the design, approved/ as built drawings, Ministry of Environment (MOE) Environmental Compliance Approvals or Storm Water Management reports and Operations & Maintenance Manuals, maintenance and assumption package documentation.</p>	<p>Engineering Services</p>	E+3 E=reconstruction of roads and ponds	No	Available once finalized	
D12-03	<p>Lot Grading Siting's</p> <p>Approved individual residential grading plan</p>	<p>Engineering Services</p>	P	No	Access to own personal file	
D13	<p>Variance Applications</p> <p>Includes records regarding the pre-consultation and the granting of minor variances in land use including zoning applications from existing zoning regulations.</p>	<p>Planning and Development</p> <p>Engineering Services</p>	P	No	Access to own personal file	Excludes: Budget Variances - see F05

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes planner's comments, signed decision and final affidavit letter, undertakings or other items satisfying conditions or final letter confirming that conditions have been satisfied (if applicable).					Part Lot Control Exemptions – see D28
D13-01	Background Information for Variance Applications Records regarding to the pre-consultation and the granting of minor variances in land use including zoning applications from existing zoning regulations, Includes general correspondence, written comments, working notes and background information.	Planning and Development Engineering Services	E+1 E= Expiry of appeal period or when OMB renders a decision	No	No	Consent/Severances – see D10
D14	Zoning Records and standards regarding to the designation of zones for land use planning purposes and zoning applications for other municipalities. Includes amendments to Holding Provisions, Temporary Use and Interim Control By-laws bylaws, council reports, consultation public comments	Planning and Development	P	No	Yes	Excludes: Zoning By-laws – C01 Council Staff Reports – C11 Minor Variances - see D13
D14-01	Background Information for Zoning Records and standards regarding to the designation of zones for land use planning purposes and zoning applications for other municipalities. Includes general correspondence, written comments, working notes and background information.	Planning and Development	E E=Final decision	No	No	
D15	Easements Includes all records on Rights of Way and Easements concerning municipal ownership of private lands in order to maintain public service such as water and sewer lines that cross private property.	Planning and Development	P	No	Yes	Excludes: Original Agreements - see L04
D16	Encroachments Includes all records regarding private properties encroaching on municipal lands including encroachment permits. Also includes surveys and any other related documentation.	Engineering Services	P	No	Permits yes, surveys no	Excludes: Original Agreements – see L04 Original Encroachment By-Laws – see C01
D17	Annexation/Amalgamation Includes all records pertaining to the annexing and amalgamating of land adjacent to municipal lands to accommodate growth. May include studies on municipal restructuring.	Legislative and Legal Services Engineering Services	P	No	Yes	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
D18	Community Improvement Projects Includes records, studies, statistics and any required background information on community development programs. Examples include Ontario Neighbourhood Improvement Programs, Community Area Improvement Programs, Community Gardens, BIA, BIC, PRID, etc. May also include records on housing rehabilitation programs, i.e. RRAP, CMHC	Planning and Development	E+6 E=Completion of project	No	Available once finalized	Excludes Economic Development - see D02
D19	Municipal Addressing Includes records regarding requests for and assignment of new subdivision and other street names and numbers. May include correspondence, reports, drawings, and copies of related by-laws	Planning and Development	E+10 E=Address no longer valid	No	Yes	
D20	Reference Plans Includes Registered Deposit (R Plans), site plans, property survey plans as received from Registry Office.	Planning and Development	P	No	Yes	Excludes Property Survey Plans - see Property/Roll file
D21	Industrial/Commercial/Infrastructure Development Includes records regarding promotion and development of industry and commerce. Records include studies, statistics, projections, monthly and quarterly reports, etc.	Planning and Development	10	No	Limited to information that does not endanger site security	Excludes Agricultural Development – see D23
D22	Digital Mapping Includes all records used to produce maps and updates in a digital format such as GIS.	Planning and Development Engineering Services	E E=data outdated	No	Limited to information that does not endanger site security	Excludes GIS system – see A03
D23	Agricultural Development Includes all records regarding development of agricultural growth.	Planning and Development	10	No	Available once finalized	
D24	Background Reports and Studies for Official Plan Includes reports pertaining to amendments and changes to the Official Plan. Includes all relevant planning and policy studies and guidelines such as Urban Design Guidelines, Technical Studies and Background Studies.	Planning and Development	P	No	No	
D25	Deeming Process Includes records regarding applications and background material for Deeming By-law applications, including Council decisions, by-laws, correspondence, etc. A Deeming By-law application is applied for in order to	Planning and Development	E+ 2 E= Final Decision	Yes	Available once finalized	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	allow for two or more neighbouring lots on a registered plan of subdivision to merge. Only applicable to parcels of land contained within a plan of subdivision that has been registered for at least 8 years.					
D26	Development Charges Study Includes records related to the development of and the final Development Charges Study as required under the Development Charges Act. Includes advertising, public meeting notices, responses, stakeholder lists, public meeting information, background information and supporting documentation, consultant reports, notices regarding adoption of the Development Charges By-law, and other records related to requirements for the development of the Development Charges By-law.	Finance	10	No	Yes	
D27	Part Lot Control Includes records regarding applications for Part Lot Control exemptions, council decisions, by-law, correspondence, etc. A Part Lot Control application is applied for to allow the conveyance of a portion of a lot without requiring approval of a land division committee (typically used to separately convey semi-detached and townhouse units). Only applicable to parcels of land contained with a registered plan of subdivision.	Planning and Development	E+ 5 E= Final Decision	No	Available once finalized	
D28	Property Files Records relating to a specific property. Includes permits, inspections, agreements and drawings.	Planning and Development	P	Yes	Limited to own personal information and does not endanger property security	
D30	Marketing Partner Files Tourism and agricultural marketing partnership. Includes promotional materials, membership agreements.	Planning and Development	10	No	Yes	

P – Permanent E - Event

E ENVIRONMENTAL SERVICES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
E00	Environmental Services Includes records regarding environmental services which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
E01	Sanitary Sewers Maintenance Includes records regarding the design, construction and maintenance of sanitary sewers.	Engineering Services	5	No	Limited to information that does not endanger system security	Excludes: Storm Sewers - see E02
E02	Storm Sewers Maintenance Includes records regarding the design notes, construction materials	Engineering Services	E+5 E= Completion of Project and no outstanding issues	No	Limited to information that does not endanger system security	
E02-01	Storm Sewer Specifications Includes as built drawings	Engineering Services	E E= Life of Asset	No	Limited to information that does not endanger system security	
E04	Trees/Forestry Includes woodlot management and records of tree removal, planting, trimming, pruning and preservation.	Engineering Services	5	No	Yes	
E06	Utilities Includes maps and location drawings provided to the municipality from utility companies such as telephone lines, gas mains, power lines, water mains etc.	Engineering Services	5	No	Limited to information that does not endanger system security	Excludes: Site Plans - see D11
E09	Drains Maintenance Includes records regarding the maintenance of drains (channel or pip) carrying surplus liquid such as rainwater or liquid waste, usually to a sewer. May include convenience copies of tenders, bylaws and grants.	Engineering Services	5	No	Limited to information that does not endanger system security	
E13	Water Monitoring Records regarding local monitoring for ponds and creeks. Including chemical samples, logs, reports, inspections.	Engineering Services	E+15 E=end life or retrofit of ponds and creeks	No	Limited to information that does not endanger system security	Excludes: By-Law Enforcement - see P01 Complaints and Inquiries - see M04
E17	Energy Management	Community Services	E+7 E=plan updated/replaced	No	Yes	Excludes: Risk Management Files – see L02

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes all records relating to the municipality's Energy Management Program. Includes published annual energy plans, copies of utility invoices and consumption profiles, commodity procurement strategies, energy related feasibility studies, audit reports and retro-fit project files and reports and records pertaining to the benchmarking of energy cost and consumption and greenhouse gas emissions. Also includes conservation and demand measures information and management of energy consumption and conservation at municipal buildings and facilities.					
E24	<p>Gasoline Storage And Dispensing</p> <p>Includes gasoline storage tank and municipal gasoline dispensing records. Routine monitoring and dispensing records relate to loading and dispensing throughput volume; vapour control equipment operation, daily/weekly visual inspection/deficiency remedy actions and maintenance; Free Oil Layer and Separated Solid Layers Measurements and removal records measurements; tank bottom water removal; temporary tank removal; Loss of Product / Inventory Control and Reconciliation Records; excavation and nearby construction potentially affecting the storage tank system integrity; vapour barrier equipment downtime record; pumping equipment tests; pumping connection leak records; storage leak tests; gasoline levels measurement, and loss and gain records; and piping system pressure tests. System records relate to drawings and specifications for system; installation record; tank and piping systems locates; storage tank and Stage II vapour recovery system commissioning inspection and testing records; and storage tank component inspection reports and compliance documents (including warnings and notices of violations).</p>	Engineering Services	E+7 E=system no longer in use	No	Limited to information that does not endanger storage security	Excludes: Underground storage abandonment record – see L07

P – Permanent E - Event

F FINANCE & ACCOUNTING

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
F00	Finance and Accounting – General Includes records regarding finance and accounting which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
F00-01	Financial Studies Includes records relating to financial related studies such as user fees study, asset management planning study, or fiscal impact study.	Finance	E+7 E= study not in use	No	Available once finalized	
F01	Accounts Payable Includes records documenting funds payable by the municipality, such as paid receipts, copies of cheques issued to pay account, rebates, levies payable, reports, telephone bills, membership fees, employee and council expenses.	Finance	7	Yes	Limited access to own personal or business information	Excludes Cancelled Cheques – see F07 Employee and council expenses – see F09
F02	Accounts Receivable Includes records documenting funds owing to the municipality, such as invoices, billing listings, requests from mortgage companies and recoveries reports. Includes correspondence related to collection tax and supporting documentation. Includes credit card (VISA) information.	Finance	7	Yes	Limited access to own personal or business information	Excludes documentation and processes and Write-offs - see F23 Tax Assessments, Rolls and Tax Arrears - see F22 Property Tax Collection – see F22-01
F03	Audits Includes records regarding internal and external financial audits of accounts.	Finance	7	No	Available once finalized	Excludes Operation audits - see relevant subject. Audited Financial Statements - see F10
F04	Banking Includes records regarding banking transactions and relationships with banks. Includes bank reconciliations and deposit records.	Finance	7	Yes	Limited access to own personal or business information	Excludes Banking Statements - see F07
F05	Budgets and Estimates Includes departmental and corporate budgets, both capital and operating. Includes all working notes, calculations and background documentation. Also includes Budget Variances.	Finance	7	Yes	Available once finalized	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
F06	Assets Includes records regarding current and fixed assets. Includes inventories as well as records of initial expenditure, depreciation, amortization, and disposal.	Finance	E+10 E=disposal of asset	No	Available once finalized	Excludes Land Acquisition and Sale - see L07
F07	Cheques Includes all cancelled cheques issued. Also includes cheque requisitions, cheque listings, and supporting documents used to authorize issuance of cheques, N.S.F. cheques and bank statements	Finance	7	Yes	Limited access to own personal or business information	Excludes Banking - see F04 Property tax related cheques – see F22-01
F08	Debentures and Bonds Includes records regarding debentures and bonds issued. Includes information regarding the initial issuance of the debenture or bond as well as all records of payments made to investors.	Finance	E+7 E=Debentures surrendered for exchange/cancellation	Yes	Limited access to own personal or business information	Excludes Debenture Registers - F14
F09	Employee and Council Expenses Includes travel and meeting expense statements and all receipts submitted by employees or Council and Committee members to substantiate their claims. May include Credit Card information i.e. account numbers and statements etc. May also include employee time sheets combined with travel and expense statements. This is a separate file, organized by Name. Expenses could also be held under F01.	Finance	7	Yes	Mostly accessible with any personal information removed	Excludes Attendance - see H01 Honoraria and fees to Council – see F16
F10	Financial Statements Includes annual financial reports which includes but not limited to audited financial statements with accompanying notes, financial statement discussion and analysis, looking forward and statistics.	Finance	P	No	Yes	
F11	Grants and Loans Includes records regarding revenue generated in the form of grants-in-lieu, provincial and federal grants, loans, Community Fund and subsidies. Also includes submissions, acknowledgements, and reports.	Finance Originating	E+7 E=date of issuing the grants or repaying the loans	No	Mostly accessible, may contain economic interests. Consult Legislative Services	Excludes Risk Management Files – see L02
F12	Investments Includes records regarding the municipality's investments, term deposits, and promissory notes.	Finance	E+7 E=close of account	No	Mostly accessible, may contain economic interests. Consult Legislative Services	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
F13	Journal Vouchers Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.	Finance	7	Yes	Limited access to own personal or business information	
F14	Subsidiary Ledgers, Registers, and Journals Includes all subsidiary ledgers, registers, and Journals such as Payment and Receipt Journals, Payroll Registers, and Debenture Registers.	Finance	7	Yes	Limited access to own personal or business information	Excludes Documents and vouchers used to support entries - see relevant subject
F15	General Ledgers and Journals Includes all records in the Books of Original Entry.	Finance	P	No	Mostly accessible, may contain economic interests	
F16	Payroll Includes all records of payments of salary, wages and deductions to employees. Includes time sheets, pay lists, Blue Cross reconciliations, Canada Savings Bonds, T4 Slips and Statistics Canada reports. Also includes honoraria and fees to Council.	Finance	7	Yes	No	Excludes Payroll Registers - Subsidiary Ledgers, Registers and Journals - see F14
F17	Purchase Orders and Requisitions Includes purchase orders and requisitions, blanket orders, and all background documentation authorizing the procurement of goods and services.	Finance	E+7 E=expiry of contract	Yes	Finalized documents only, bid analysis no, only for own business	Excludes Quotations and Tenders - see F18
F18	Quotations And Tenders Includes records regarding quotations and tenders obtained from suppliers of goods and services. Includes Requests for Proposal, Invitations to Tender, Proposals, Tender Submissions, Pre-qualifications, and all documentation regarding the selection process	Finance	E+7 E=expiry of contract Unsuccessful Bid = 1	Yes	Finalized documents only, bid analysis no, only for own business	Excludes successful bids - see L04
F19	Receipts Includes receipts issued for payment of items such as licenses, rentals and taxes.	Finance	7	Yes	Limited access to own personal or business information	Excludes Property tax related receipts – See F22-01
F20	Reserves and Reserve Funds Includes records documenting obligatory and/or discretionary reserves or reserve funds such as reserves for working funds, contingencies, future capital projects, and information systems, etc.	Finance	7	No	Available when finalized	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
F21	Revenues Includes records regarding the generation of revenues other than taxes such as development charges and collected user fees authorized under User Fee Bylaw.	Finance	7 Mortgage related is 10	No	Yes	Excludes Accounts Receivable - see F02 Tax Rolls - see F22
F22	Tax Rolls and Records Includes taxation records of long term importance, such as assessment rolls, tax sale records, tax sale deeds, property tax registrations, tax arrears register cards and tax collector's rolls.	Finance	P	Yes	Limited access to own personal or business information	Excludes Correspondence related to tax issues that are not of a long term importance - see F22-01
F22-01	Property Tax-Administration Includes administrative documents and correspondences regarding to property tax related operations. Examples include but are not limited to: Lawyers letters indicating a sale or requesting tax status, tax certificates, Mortgage company requests, general ratepayer requests and resulting staff responses, Autopay Void Cheques, Images of payment cheques, Charity Rebate, Older Adult Deferral, Right of Way, Payment in Lieu, etc.	Finance	7	Yes	Limited access to own personal or business information	
F23	Write Offs Includes accounts receivable that have been written off as uncollectible. Also includes records of bankruptcies.	Finance	7	Yes	Limited access to own personal or business information	Excludes Accounts Receivable - see F02
F24	Trust Funds Includes records regarding funds established by the municipality for money held in trust, such as bequests, cemetery trust funds, cemetery care and maintenance programs, Homes for the Aged Residents (including authorization, receipts and statements of withdrawal) and Ontario Home Renewal Program such as fund accounting records, bank statements, banking instructions and fund audit records.	Finance	7	Yes	Limited access to own personal or business information	
F25	Security Deposit/Damage Deposits Includes development deposits, letters of credit, and proof of insurance when required and records of monies held as security (ie. bonds).	Finance	E+7 E=Closure of account	Yes	Limited access to own personal or business information	
F26	Working Papers-Financial	Finance	E+1 E=Completion of audit	Yes	No	Excludes Financial Statements – see F10

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes all working/meeting notes, calculations, reconciliations, end of year payment in lieu of taxes statements to school, and background documentation used to calculate financial statements such as the Monthly Trial Balance.					
F27	<p>Regulatory Reporting – Financial</p> <p>Includes regulatory, financial information returns and government reporting such as HST returns, tax rebate filings, and the Ministry of Municipal Affairs Financial Information Return (FIR) and the Municipal Performance Measurement Program (MPMP) that collects municipal services data on an annual basis as a part of the FIR.</p>	Finance	7	No	Varies, contact Legislative Services	

P – Permanent E - Event

H HUMAN RESOURCES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
H00	Human Resources – General Includes records regarding human resources which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
H01	Attendance and Scheduling Includes records regarding employee attendance, alternate work program, shift scheduling, vacation schedules, leave of absences, etc.	Originating	3	Yes	No	Excludes: Individual Time Sheets - see F16
H02	Benefits Program Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees, such as group insurance, dental plans, and general information on EHT.	Human Resources	E E=information outdated	No	Only what is publically available	Excludes: Payroll - see F16 Individual Pension and Benefit records – see H10
H03	Employee Records Includes records regarding the employment history of municipal employees. Includes initial resumes and applications, performance evaluations, legislative training records, correspondence with the employee, and employee assistance. Includes part-time, student employees and volunteers.	Human Resources Originating	E+7 E=Termination of employment/Volunteering	Yes	No	Excludes: Grievances – see H14
H03-01	Employee Records-firefighters	Human Resources Fire	E+25 E=Termination of employment/ volunteering	Yes	No	
H04	Health and Safety Records regarding the occupational health and safety of staff. Includes Joint Health & Safety Committee (JHSC) meeting minutes, JHSC safety inspection records, regulatory inspection/audit/enforcement records and staff incident/accident reports, Also includes designated substances assessments and Workplace Safety & Insurance Board certificates.	Human Resources Originating	5	Yes	No	Excludes: Accidents of the Public - see P05 Lost-time reports and claims – see H13 Health and safety training development – see H12/H12-01 Employee training certificates - see H03/H03-01
H05	Human Resource Planning Includes records of succession planning, executive placement, retirement programs, staff turnover rates, annual hire/promotion targets, recruitment freezes, employment equity, performance management, and related records.	Human Resources	E+1 E=Plan no longer in use	No	No	Excludes: Employee Records - see H03

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
H06	Job Descriptions Includes job descriptions and specifications as well as background information used in their preparation or amendment.	Human Resources	E E=updated/replaced	No	Varies, consult Legislative services	
H07	Labour Relations Includes records regarding the relationship between labour and management. Includes collective bargaining, correspondence with unions and negotiations.	Human Resources	E+10 E=when contract is no longer active	No	No	Excludes: Collective Agreement – see L04
H08	Organization Design Includes records regarding reporting relationships, reorganization, organizational analysis, etc. Includes organization charts.	Human Resources	E+1 E=updated	No	Final Copy only	Excludes: Job Descriptions - see H06
H09	Salary Planning Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, salary surveys and schedules. Also includes any reference material retained regarding issues related to pay equity and compliance.	Human Resources	5	No	No	Excludes: Employee Records - see H03
H10	Pension and Benefits Records Includes records detailing obligations to individuals under OMERS. Includes pension information of current and retired personnel, including registration/enrolment and records.	Human Resources	7	Yes	No	Excludes Deductions for pensions – see F16 General information on pension plans - see H02 Payments made to OMERS - see F01
H11	Recruitment Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions and unsuccessful applications.	Human Resources	1	Yes	Only what is publically available	Excludes: successful applications – see H03
H12	Training Development Includes records regarding courses offered to employees, and information on career and professional development programs. Also includes development of course content or materials for specific courses.	Originating	3	Yes	No	Excludes: Employee training attendance or certificates - see H03 Road salt usage or drinking water or hazardous material use related training – see H12-01
H12-01	Training Development – Special	Originating	7	Yes	No	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Including drinking water training, salt use training and hazardous material use training and PTSD training etc.					
H13	Claims Includes medical records regarding claims to WSIB or insurance carriers for lost-time incidents, accidents, STD or LTD. Includes accident notice, accident report.	Human Resources	E + 3 E=Resolution of claim	Yes	No	Excludes: Non lost-time incidents - See H04 Self-insured STD – see H04
H13-01	Claims- Hazardous exposure claims Records related to claims for exposure to airborne Acrylonitrile, benzene, lead, mercury, silica, vinyl, chloride, arsenic, ethylene oxide or asbestos etc.	Human Resources Originating	E+40 E=Latest record made	Yes	No	
H14	Grievances Includes records dealing with grievance complaints filed against the Town such as the initial complaint, investigation, reports and final resolution including arbitration and arbitration awards.	Human Resources	E+10 E=resolution of claim	Yes	No	Excludes: Harassment & Violence – see H15
H15	Harassment and Violence Includes records dealing with harassment and/or violence complaints by or against employees of the municipality. It includes documents such as the initial complaint, investigation, reports and final resolution	Human Resources	E+3 E=resolution of complaint	Yes	No	Excludes Grievances – see H14 Abuse investigation records not involving staff – P08
H16	Criminal Background Checks Includes records listing any criminal code convictions that have not been pardoned for all existing and new employees, service providers and volunteers. Also includes annual Criminal Offence Declaration.	Human Resources	E + 7 E = termination of employment	Yes	No	
H17	Employee Medical Records – Hazardous Materials Includes records of exposure to asbestos and other hazardous materials. Also includes serious incident and chemical exposure records for firefighters.	Human Resources	E+40 E=resolution of claim	Yes	No	
H18	Employee Medical Records Includes doctor’s notes, correspondence, and health reports related to an employee’s medical situation	Human Resources	E + 3 E=When STD/LTD claims are resolved	Yes	No	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
H19	<p>Disability Management</p> <p>Includes all records related to occupational and non-occupational injuries and illnesses. Also includes accommodation records related to permanent impairment under the Human Rights Code resulting in permanent accommodation.</p>	Human Resources	<p>E + 5</p> <p>E= day issued or earlier as may be specified by Commission</p>	Yes	No	
H21	<p>Employee Recognition</p> <p>Includes all records and correspondence related to employee awards and honours granted by the Municipality. Includes: organized employee events such as staff barbeques, retirement celebrations, service awards, recognition parties, etc.</p>	Human Resources	5	Yes	No	

P – Permanent E - Event

J JUSTICE

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
J00	Justice general Includes records regarding court affairs which cannot be classified elsewhere. Use only if no other heading is available.	Originating	4			
J01	Certificates Of Offence (Part I) Includes Part 1 Certificates of Offence excluding Accident and Careless Driving offences. Records identified as POA schedule # CD-4R1.	Legislative and Legal Services	E+ 2 E=completion	Yes	Own personal information	
J04	Court Dockets Includes registers of court activity including POA (trial) dockets, Fail To Respond (FTR) dockets and Walk In Guilty (WIG) dockets detailing case dispositions (completed dockets). Also includes statistics on court activities and disposition of fines.	Legislative and Legal Services	5	No	Consult Legislative Services	
J05	Transcripts & Records Of Court Proceedings Includes records of court proceedings and records relating to exhibit dispositions. Includes tapes and log books.	Legislative and Legal Services	7	Yes	Consult Legislative Services	
J07	Appeals & Transfers Includes records of appeals and of transfers to and from other Courts.	Legislative and Legal Services	7	Yes	Consult Legislative Services	Excludes Appeals & Hearings (Municipal) – L01
J09	Disclosure Includes information requested by individuals in preparation for court cases.	Legislative and Legal Services	7	Yes	No	

P – Permanent E - Event

L LEGAL AFFAIRS

Class Code	Secondary Heading	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
L00	Legal Affairs – General Includes records regarding legal affairs which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
L01	Appeals and Hearings Includes all transcripts and related documentation regarding appeals, hearings, and legal proceedings. Includes final judgments. Includes zoning appeals, official plan appeals, tax appeals, Local Planning Appeal Tribunal / Ontario Municipal Board appeals and Committee of Adjustment appeals. Also includes orders issued by regulatory bodies and boards.	Originating	P	Yes	No, if not otherwise publicly available	Excludes: Litigation - see L02- L03 Includes closed meeting investigator
L02	Claims Against the Municipality Includes all litigation made by other parties against the municipality.	Finance	E+7 E=resolution of claim and all its appeals or if minors are involved, minors reach age of majority whichever comes later	Yes	No	Excludes: Appeals and Hearings - see L01
L03	Claims By the Municipality Includes all litigation made against other parties by the municipality.	Finance	E+7 E=resolution of claim and all appeals	Yes	No	Excludes Appeals and Hearings - see L01
L04	Contracts and Agreements - Under By-law Includes all agreements entered into by the municipality which require a by-law for approval. Includes construction contracts, collective agreements, development front-ending agreements, and subdivision agreements. Also includes agreements regarding tax arrears payment extension, easements, encroachments, area ways, laneways and records transfer.	Legislative and Legal Services	P	Yes	Final contracts only	Excludes Office Equipment Maintenance Agreements - see L14 Contracts regarding Land - see L07
L04- 01	Preparation/Negotiation Documentation Includes working notes, key correspondences, major drafts and related legal opinions.	Originating	15	Yes	No	Insurance Policies - see L06

P – Permanent E - Event

Class Code	Secondary Heading	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
L04-02	Reporting and Administration Includes reports or updates which are required under certain contracts and/or agreements such as quarterly reports to landowners; preparation of quarterly/annual remittance to Trustees; or tracking of cash flow assistance etc... Also includes the tracking of developer liabilities established through an agreement. For example developers build parks, bridges or fund studies on Town's behalf and are reimbursed by the Town.	Originating	E+7 E=Expiry of Contract	Yes	No	Line fence agreements – see P01
L05	Insurance Appraisals Includes appraisals of municipal property for insurance purposes.	Finance	E + 15 E = New appraisal has been done	Yes	Consult Legislative Services	
L06	Insurance Policies Includes municipal insurance policy documents, such as vehicle, liability, theft, and fire insurance.	Finance	E+15 E=Expiry of policy	No	No	Excludes Employee Group Insurance - see H02 Third Party Contracts - see L04
L07	Land Acquisition and Sale Includes records regarding real estate transactions and conveyance of land such as lot sales, easements, road allowance closings whether through voluntary transactions or expropriation. Includes leases, deeds and expropriation plans, purchase letters and appraisals, and potential land acquisitions and sale.	Legislative and Legal Services Economic Development	E + 10 E=date of land disposition, expiration of lease, replacement of plans or studies	No	Varies, consult Legislative Services	
L08	Opinions and Briefs Includes copies of opinions and briefs prepared by the municipality's legal counsel on specific issues.	Originating	E E=no longer applicable	No	No	Excludes Files by subject –see subject categories
L12	Vital Statistics Includes registers of births, deaths and marriages.	Legislative and Legal Services	P	Yes	No	Excludes Population Statistics - see D01
L12-01	Marriage Licences Includes licence applications and supporting documents	Legislative and Legal Services	2	Yes	Access to your own personal information	
L12-02	Burial Permits Includes permit applications and supporting documents	Legislative and Legal Services	2	Yes	No	

P – Permanent E - Event

Class Code	Secondary Heading	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
L13	Prosecutions Includes records regarding prosecutions to enforce by-laws and federal and provincial legislation.	Legislative and Legal Services	E+7 E=delivery of judgement	Yes	No	Excludes Bylaw Enforcement - see P01 Appeals and Hearings - see L01
L14	Contracts and Agreements – Simple Includes contracts and agreements which do not require by-law approval, such as equipment rental and service contracts and vehicle lease and purchase agreements.	Originating	E+7 E= Expiry of contract	No	Varies, contact Legislative Services	

P – Permanent E - Event

M MEDIA & PUBLIC RELATIONS

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
M00	Media and Public Relations – General Includes records regarding media and public relations which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
M01	Advertising Includes records regarding public advertising in magazines, newspapers, radio, television, and transit.	Corporate Communications	1	No	Yes	Excludes: News Releases - see M06 Recruitment - see H11 Elections - see C07 Tenders or Bids – see F18
M02	Ceremonies and Events Includes records regarding the set-up and running of special events or ceremonies.	Mayor & CAO Offices	5	No	Yes	Excludes: Employee recognition events – see H21
M03	Charitable Campaigns/Fund Raising Includes records for the municipality, for municipality run programs or for other charitable organizations. This would include the United Way, Cancer Fund, community interest groups, etc.	Originating	1	No	Varies, Consult Legislative Services	Excludes: Receipts - see F19
M04	Complaints, Commendations and Inquiries Includes records regarding commendations, requests for information, and very general types of inquiries and general complaints. Also includes concerns about services offered by the municipality, inquiries about council proceedings and congratulatory letters.	Originating	5	Yes	Access to own personal information	Excludes: Freedom of Information Requests - see A17 Grievances or harassment/violence complaints by or against employees – see H14, H15 Employee recognition – see H21
M05	News Clippings Includes clippings from newspapers, information from journals and other printed media.	Corporate Communications	1	No	Publically available	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
M06	News Releases Includes background notes and final versions of news releases issued. Includes messages for inclusion in special event programs.	Corporate Communications	1	No	Publically available	
M07	Publications Includes typed manuscripts, artwork, printed copies and related records regarding the publication of tourism information, trade shows, current events, industrial directories, business directories, and maps. May include annual reports of a non-financial nature, Community Service guides and newsletters.	Corporate Communications	E E=discontinued or replaced	No	Publically available	
M07-01	Major publications by municipality Publications records major events or development of the municipality for historical references and researches. Includes annual reports, destiny Milton.	Corporate Communications	P	No	Publically available	
M08	Speeches and Presentations Includes background notes and final versions of speeches, presentations and news conferences given by elected and non-elected officials.	Corporate Communications	3	No	Yes	Excludes: Media coverage of speeches/presentations - see M05 News Releases - see M06
M09	Visual Identity and Insignia Includes records regarding branding and the standards which apply to graphic designs as part of a Visual Identity Program. Includes trademarks, logo and letterhead design, signage, flags, vehicle identification, etc. Also includes records regarding corporation insignia and seals of office.	Corporate Communications	P	No	Final copies only	
M10	Website and Social Media Content Includes snapshots of website content and copies of web pages created by the municipality for general public use. Also includes information on social media sites such as Facebook & Twitter	Corporate Communications	E+2 E=updated or replaced	No	Yes	
M11	Public Relations and Public Awareness	Mayor and CAO Office	5	No	Yes	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	Includes outgoing letters of support, congratulations, greetings, honourable achievement awards, welcome letters, etc. Also includes issues regarding internal/external communications. Includes programs designed for public awareness and engagement.	Corporate Communications				
M12	Intellectual Property Include certificates of copyright, applications for patents and trademark registration. Also includes monitoring and enforcement of authorized use of copyright, trademarks and patents including copyright use permission requests.	Corporate Communications	E+5 E= copyright, patent or trademark expired or last use	No	Yes	

P – Permanent E - Event

P PROTECTION & ENFORCEMENT SERVICES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
P00	Protection & Enforcement Services – General Includes records regarding protection and enforcement services which cannot be classified elsewhere. Use only if no other heading is available.	Legislative and Legal Services	1			
P01	By-law Enforcement Includes records of municipal efforts to enforce bylaws such as orders to comply, inspection reports, stop work orders, working notes, correspondence, exhibits, photographs etc. Also includes records regarding parking tickets and parking enforcement, occurrence reports.	Legislative and Legal Services	7	Yes	Limited to cumulative statistics and own orders or tickets	Excludes: Fire Inspections - see P07 Fire Marshal Investigations – see P08 Prosecutions - see L13
P02	Daily Occurrence Logs Includes logs maintained of daily occurrences by staff.	Legislative and Legal Services	5	No	Consult Legislative Services	
P02-01	Crew Cards/Log Sheets Includes records of work locations for Operations employees	Engineering Services	7	Yes	No	
P03	Emergency Planning Includes records regarding the planning and rehearsal of emergency measures	Fire	E E=plan replaced or updated	No	Only what is publically available	
P04	Hazardous Materials Includes information and reports on chemicals and substances that pose fire or environmental hazards such as PCBs, refrigerants and halocarbons, Also includes Material Safety Data Sheets (MSDS) and records dealing with toxic substances control, halocarbon charging records, halocarbon leak tests and release reports, transportation and effects as well as records of pesticide use and environmental spills	Originating	E+5 E=the material no longer in use	No	Mostly accessible, may contain security related information	Excludes Staff Safety Training - see H12 Personal exposure – see H17
P05	Incident/Accident Reports Includes vandalism and security incident reports and reports of accidents that occur at recreational facilities and other municipal properties.	Finance	E+5 E=close of action	No	No	Excludes: Security - see A18 Accidents of Municipal Staff - see H04

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
						Vehicle Accidents - see L02 or L03 Emergency Incident Reports – see P17
P06	Building and Structural Inspections Includes inspection reports such as building, plumbing, fire prevention and other structural inspections. Also includes inspections of marijuana grow operations after appropriate notification from a police force.	Planning and Development	E E= End life of the Building	Yes	Access to own personal or business files	Excludes: By-law Enforcement – see P01
P07	Fire Safety Inspections Includes Fire Marshal related health and safety violation and verification inspection reports conducted or performed on private, public and commercial properties.	Fire	E E=outdated	Yes	Access to own personal or business files	
P08	Fire Marshal Investigations Includes records of fire marshal investigations on emergencies such as traffic accidents or fire fighting activities.	Fire	10	Yes	Access to own personal or business files	Excludes: By-law Enforcement – see P01 Harassment & Violence staff investigations – see H15
P09	Licences Includes records regarding licenses administered by or required by the municipality, or required by the province, such as licensing for dog kennels, dogs, liquor, businesses, lotteries, special occasion letters, etc.	Legislative and Legal Services	E+3 E=Expiry of License	Yes	Access to own personal or business files	Excludes: Marriage Licences - see L12-01
P10	Building Permits Includes information regarding permits, permits issued to builders, contractors, and residents giving them permission to build or renovate. Includes certificates of occupancy, pool permits, or septic permits, Includes information regarding permits, permits issued to builders, contractors, and residents giving them permission to build or renovate. Includes certificates of occupancy, pool permits, septic/sewage permits or backflow prevention permits.	Planning and Development	P	Yes	Yes	Excludes: All other permits - see P11

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
P11	Permits, Other Includes applications and copies of permits issued by other government bodies within the Town as well as permits issued giving permission to hold special events, burn permits, facility rentals, signs, parking on the street, etc.	Originating	E+3 E=Expiry of permit	Yes	Access to own personal or business files	Excludes: Building Permits - see P10 Encroachment Permits - see D16 Burial Permits - see L12-02 Road and lane opening/closings – see T09
P11-01	Development Permit Application - Niagara Escarpment Commission Records about reviewing NEC applications, includes NEC applications, permits, planner comments and revisions	Planning and Development	E+7 E=Date of final decision	Yes	Access to own personal or business files	
P12	Warrants Includes all issued warrants.	Legislative and Legal Services	E+2 E=Execution of warrant	Yes	Access to own personal or business files	
P13	Criminal Records Includes all documentation relating to individuals with a history of criminal activity.	Legislative and Legal Services	E+5 E=Occurrence/ investigation closed or disposition of charge	Yes	Access to own personal or business files	Excludes: Investigations Prosecutions – see L13
P14	Animal Control Includes records regarding the control of household pets, strays, livestock and wildlife and livestock evaluation reports. Also includes records of distrained animals and pound animal records.	Legislative and Legal Services	E+3 E= after animal is impounded	Yes	Access to own personal or business files	Excludes: Dog Licenses - see P09
P15	Community Protection Programs Includes records on community protection and crime prevention such as Fire Training Programs, Milton Safety Committee and Block Parents. Records include correspondence and brochures.	Fire	E+2 E=information updated	No	Yes	

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
P16	Emergency Services Includes records regarding fire and rescue services.	Fire	E+5 E=outdated or not in use	Yes	Access to own personal or business files	
P18	Fire Accident Response Reports Includes records relating to fire services provided such as fire suppression and emergency call response. Includes fire call reports and fire cause identification.	Fire	P	Yes	Access to own personal or business files	Excludes: Investigations – see P08
P19	Fire Statistics Includes records relating to performance plans and the associated statistical reporting of performance and calls.	Fire	E + 2 E=updated or replaced	No	Yes	
P21	Facilities Routine Water Use, Monitoring and Testing Includes records regarding the testing of swimming pool or splash pad water for chlorine and pH levels, water outlet inspections, the number of bathers per day, any rescues or breakdowns of equipment. Also includes routine testing, monitoring and flushing of water systems in Town's recreation facilities.	Community Services	1	No	Consult Legislative Services	

P – Permanent E - Event

R RECREATION & CULTURE

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
R00	Recreation and Culture – General Includes records regarding recreation and cultural services which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
R01	Heritage Preservation Includes records regarding heritage and historical development, including designations and registers of buildings, districts, and cemeteries as well as archaeological digs, archaeological and heritage assessments, and heritage conservation district studies and plans. May also include heritage registries.	Legislative and Legal Services Planning and Development	P	No	Consult Legislative Services	Excludes: Original By-Laws - see C01
R04	Parks and Trails Management Includes correspondence, descriptions, reports and other records dealing with the management design, set-up, and landscaping of specific municipal parks. Includes maps and plans	Community Services	E E=End life of Parks/Trails	No	Yes, excluding any personal or park security information	Excludes: Parks and Trails Maintenance – see A20
R05	Recreational Facilities Includes correspondence, descriptions, reports and other records dealing with the management, operation and design of specific municipal recreational facilities, such as arenas, rinks, halls, schools, pools, and fitness centres. Includes floor plans, architectural and engineering drawings. More specific information is filed by subject.	Community Services	E E=End life of the facilities	No	Inspection reports only	Excludes: Facilities Construction - see A19 Facility Maintenance - see A20
R06	Recreational Programming Includes correspondence, applications, registrations and general information regarding the development and delivery of recreational programs to the community such as youth, sport and fitness, adult education, crafts, membership forms, and other programs.	Community Services	3	Yes	Access to own personal or business files	
R06-01	Registration records Includes withdrawal forms/refund forms/CLASS adjustments/waiver forms.	Community Services	1	Yes	Access to own personal or business files	
R06-02	Attendance fee collection	Community Services	7	Yes	Access to own personal or business files	

P – Permanent E - Event

S SOCIAL & HEALTH CARE SERVICES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
S00	Social and Health Care Services – General Includes records regarding social and health care services provided to individual residents which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
S04	Community and Social Assistance Services Includes general program information regarding financial assistance program and support available to residents within the municipality.	Community Services	E+3 E=end of services	Yes	Access to own personal information	
S11	Disabilities Support Clients Includes records dealing with applications for and provision of services and funding support to persons with mental or physical disabilities including service and support profiles, and accessible transportation eligibility application and approval, behaviour support plans, intrusive behaviour intervention and crisis situation incident reporting. Also includes personal support plans and records for individuals as well as summary reports relating to support services provided for people with disabilities.	Originating	E+7 E= no longer receiving support	Yes	Access to own personal information	Excludes: serious occurrences and abuse allegations involving municipal staff – see H15

P – Permanent E - Event

T TRANSPORTATION SERVICES

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
T00	Transportation – General Includes records regarding transportation which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1			
T01	Illumination Includes records and studies regarding the installation and repair of equipment used to illuminate roads such as street lights, pedestrian crossover lights, etc. Also includes records on power consumption.	Engineering Services	E+6 E=completion of project/request with no issues	No	Yes, excluding any security related information	Excludes: Lights Specifications – see A27
T02	Parking Includes records and studies regarding municipal parking issues such as handicapped parking, lot and garage operations, fire routes and employee parking	Engineering Services	E+6 E=lot closed	No	Yes	Excludes: Parking Enforcement – See P01
T03	Public Transit Operations Includes records regarding public transit systems. Includes schedules, routes, maps and similar information. Also includes project records regarding the construction of bus shelters and similar facilities, route administration and planning, fare policies, and intergovernmental transit co-ordination.	Engineering Services	E + 1 E = Outdated	No	Yes	Excludes: Accidents – See L02
T04	Road Construction Includes records and studies regarding construction projects on roads. Includes the construction of new roads and major improvements to existing roads, such as resurfacing, widening, bridges, etc.	Engineering Services	E+5 E= completion of project/request with no issues Specifications are Permanent	No	Consult Legislative Services	Excludes: Design and Planning - see T05 Routine maintenance and minor improvements to road systems – see T06
T05	Road Design and Planning Includes estimates, studies and other records regarding the design and planning of specific road construction projects. Also includes design of curbs and sidewalks, cycle ways, footpaths, walkways, etc.	Engineering Services	E+5 E=outdated Specifications are Permanent	No	Consult Legislative Services	Excludes: Road Specifications – see A27
T06	Road Maintenance Includes records and studies regarding the inspection and maintenance of roads. Minor repair maintenance Includes the installation of culverts, minor repairs to the road surfaces, curbs and side-walks, cycle-ways,	Engineering Services	E+5 E=completion of project/request with no issues	No	Consult Legislative Services	Excludes: Road Specifications – see A27

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	footpaths, walkways, etc. Routine maintenance includes grading, ploughing and sanding of roads, and snow removal and cleaning, winter maintenance.		Specifications are Permanent			Claims – see L02
T06-01	Salt Usage Includes Salt Management Plan and revisions, yearly review, reports, other records, studies, and information regarding salt usage and contamination from salt used on roads.	Engineering Services	7	No	Consult Legislative Services	
T07	Signs and Signals Includes records and studies regarding the manufacture, installation and servicing and maintenance of signs and signals.	Engineering Services	E+5 E=completion of project/request with no issues	No	Yes	Excludes: Visual Identity Program - see M09 Claims – see L02 Sign Permits – see P11
T08	Traffic Includes records about traffic related capital projects. Includes studies and information regarding the flow of traffic on roads. Includes intersection drawings, pedestrian crossovers, crossing guards, traffic counts, accident statistics and related records. Also includes temporary road closures for special events.	Engineering Services	E+5 E=completion of project/request with no issues	No	Consult Legislative Services	Excludes: Specifications – see A27
T09	Roads and Lanes Closures Includes records on roads and lanes closed on a permanent or regular basis. Records include reports, appraisals, correspondence and district court applications. As well as records related to requests to open road and street allowances.	Engineering Services	E+5 E=completion of project/request with no issues	No	Yes, may be limited to own personal or business information	Excludes: Temporary road closures - see T08 Land Sales - see L07 Road Closing By-Laws - see C01 Excludes: Specifications – see A27
T10	Field Survey/Road Survey Books Includes engineering field survey notes as well as books.	Engineering Services	E+5 E=completion of project/request with no issues	No	Consult Legislative Services	
T11	Bridges Includes estimates, studies and other records regarding projects specifically for bridge construction, also includes bridge repairs and maintenance.	Engineering Services	E+5	No	Yes, excluding any security related information	Excludes: Specifications – see A27

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
			E=completion of project/request with no issues			

P – Permanent E - Event

V VEHICLES & EQUIPMENT

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
V00	Vehicles and Equipment – General Includes records regarding vehicles and equipment which cannot be classified elsewhere. Use only if no other heading is available.	Originating	1	No	Yes, excluding any security related information	
V01	Fleet Management Includes records of summary fleet information and fleet records for each vehicle (including attached devices such as Fire-Fighting Chassis Mounted Aerial Devices) leased or owned, operated and maintained by the municipality. This includes plate permits, CVOR certificates, operating manuals, routine/daily inspections, vehicle history files, and vehicle maintenance, registration and disposal.	Engineering Services Fire	E+1 E=Dispose of equipment	No	Yes, excluding any security related information	Excludes: Insurance Policies - see L06 Accident Claims - see L02, L03 Leases/Contracts - see L14
V01-01	Vehicle Daily Inspection	Engineering Services	2	No	Yes, excluding any security related information	
V01-02	Public vehicles trip records	Engineering Services	1	No	Yes, excluding any security related information	
V02	Mobile Equipment Includes records and operating manuals regarding mobile (motorized) equipment used in conjunction with vehicles. Also includes routine inspections, maintenance and history files on equipment such as generators, pumps, snow-blowers, sanders, etc.	Originating	E+1 E=Dispose of equipment	No	Yes, excluding any security related information	
V03	Transportable Equipment Includes operating manuals and records regarding transportable equipment used by the municipality. Also includes routine inspections, maintenance and history files on equipment such as lawnmowers, hoses, weed-eaters, drills, and rescue equipment.	Originating	E+1 E=Dispose of equipment	No	Yes	
V04	Protective Equipment Includes records regarding protective equipment used by the municipality. Also includes maintenance and history files on equipment such as breathing apparatus, breathing tanks, down alarms, etc.	Originating	E+1 E=Dispose of equipment	No	Yes	Excludes: Uniforms and Clothing - see A14
V05	Ancillary Equipment Includes records regarding fixed equipment, which is non-vehicle and non-office in nature. Includes equipment such as work or suspended platforms, lifting devices not attached to a structure, appliances such as autoclaves and dishwashers,	Originating	E+1 E=Dispose of equipment	No	Yes, excluding any security related information	Excludes: Gasoline storage tanks – see E24

P – Permanent E - Event

Class Code	Secondary Heading and Description	Responsible Area	Retention Period	Personal Information	Access to Records	Remarks
	garbage compactors, industrial shredders etc. Includes correspondence, equipment user and procedural manuals, warranty, routine inspections, maintenance, licences and history records. Includes setup tests and manuals.					Mechanical & operational systems integral to building structure – see A26

P – Permanent E - Event

P – Permanent E - Event

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW NO. 097-2023

BEING A BY-LAW TO AUTHORIZE THE BORROWING OF MONIES AS SPECIFIED IN THIS BY-LAW, TO MEET, UNTIL THE TAXES ARE COLLECTED, THE CURRENT EXPENDITURES OF THE CORPORATION OF THE TOWN OF MILTON FOR THE YEAR 2024.

WHEREAS in accordance with subsection 407(1) of the *Municipal Act*, R.S.O. 2001, as amended, (the "Act"), the Council for the Corporation of the Town of Milton considers it necessary to borrow the amount of \$73,100,000 for the period of January 1st to September 30th and \$36,500,000 for the period of October 1st to December 31st to meet, until taxes are collected, the current expenditures of the Corporation of the Town of Milton for the year 2024.

AND WHEREAS pursuant to subsection 407(2) of the Act, the total amount borrowed pursuant to this by-law, together with the total of any similar borrowings, is not to exceed the limits set forth in that subsection;

AND WHEREAS the total amount previously borrowed by the Corporation of the Town of Milton pursuant to Section 407 that has not been repaid is \$0.

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** the Treasurer is hereby authorized, on behalf of the Corporation of the Town of Milton, to borrow from time to time, by way of Promissory Note or Bankers' Acceptance from the Town's banking services provider ("the Bank"), a sum or sums not exceeding the aggregate \$73,100,000 for the period of January 1st, 2024 to September 30th, 2024 and \$36,500,000 for the period of October 1st, 2024 to December 31st, 2024 to meet, until the taxes are collected, the current expenditures of the Corporation of the Town of Milton for the year (including the amounts required for the purposes mentioned in Subsection 407(1) of the Act) and to give to the Bank Promissory Notes or Bankers' Acceptances, as the case may be, sealed with the Corporate Seal of the Corporation of the Town of Milton and signed by the Treasurer for the sums borrowed plus interest at a rate to be agreed upon from time to time with the Bank.
2. **THAT** all sums borrowed pursuant to this By-law, as well as all other sums borrowed pursuant to the Act in this year and in previous years from the Bank for any purpose will, with interest thereon, be a charge upon the whole of the revenues of the Corporation of the Town of Milton for the current year and for all preceding years as and when this revenue is received.

3. **THAT** the Treasurer is hereby authorized and directed to apply in payment of all sums borrowed, plus interest, all of the monies collected or received on account in respect of taxes levied for the current year and preceding years or from any other source which may lawfully be applied for this purpose.
4. **THAT** the Treasurer is authorized to furnish to the Bank, a statement showing the nature and amount of the estimated revenues of the Corporation of the Town of Milton not yet collected and also showing the total of any amounts borrowed that have not been repaid.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

_____ Mayor
Gordon A. Krantz

_____ Town Clerk
Meaghen Reid

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW 098-2023

BEING A BY-LAW TO AMEND THE TOWN OF MILTON COMPREHENSIVE ZONING BY-LAW 016-2014, AS AMENDED, PURSUANT TO SECTION 34 OF THE *PLANNING ACT* IN RESPECT OF THE LANDS DESCRIBED AS PART OF LOT 6, CONCESSION 3, FORMER GEOGRAPHIC TOWNSHIP OF TRAFALGAR, TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (BOYNE URBAN DEVELOPMENT INC.) – FILE: Z-02/21

WHEREAS the Council of the Corporation of the Town of Milton deems it appropriate to amend Comprehensive Zoning By-law 016-2014, as amended;

AND WHEREAS the Town of Milton Official Plan provides for the lands affected by this by-law to be zoned as set forth in this by-law;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Schedule A to Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by changing the existing Future Development (FD) zone symbol to a Residential Medium Density II – Special Provision 340 (RMD2*340) zone symbol on the land shown on Schedule A attached hereto.
2. **THAT** Section 13.1.1 of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding Section 13.1.1.340 to read as follows:

Residential Medium Density II - Special Provision 340 (RMD2*340) Zone

Notwithstanding any definition and provision in the by-law to the contrary, the following shall apply:

i) Additional Permitted Uses:

- a. Stacked Townhouse Dwelling, subject to the zoning standards for Multiple Dwelling except where further amended by this bylaw.

ii) Zone Standards for All Dwelling Types:

- a. Minimum Front Yard Setback (Hickory Crescent): 2.0 metres
- b. Minimum Interior Side Yard Setback: 1.2 metres
- c. Minimum Exterior Side Yard Setback (Kennedy Circle W): 2.0 metres
- d. Minimum Rear Yard Setback (Britannia Road): 3.0 metres
- e. Minimum Landscaped open space: 27%

iii) Special Site Provisions

- a. For the purpose of this zoning by-law, 'Lot' shall mean the perimeter of the aggregate of contiguous parcels of land and/or dwelling units under separate ownership which are described in a Plan of Condominium.
 - b. Minimum off-street parking requirements:
 - i. Resident parking provided in any combination of garage, exclusive use driveway, and common parking areas: 91 spaces;
 - ii. Visitor parking: 16 spaces; and
 - iii. Of the spaces required by i. and ii. above, 2 resident spaces and 1 visitor space shall be accessible parking spaces.
 - c. Maximum width of an exclusive use driveway: 3.6 metres.
 - d. Minimum setback of a parking area from an Interior Side Lot line: 1.2 metres.
 - e. Minimum setback of a parking structure from an Interior Side Lot line: 0.3 metres.
 - f. A minimum setback of 3.0 metres shall be permitted from any wall or structure enclosing an exit or entrance ramp above or below grade to a street line abutting a public street provided that the ramp is not directly accessible from the public street.
 - g. Section 5.9 v) shall not apply.
3. If no appeal is filed pursuant to Section 34(19) of the *Planning Act*, R.S.O. 1990, c. P.13, as amended, or if an appeal is filed and the Ontario Land Tribunal dismisses the appeal, this by-law shall come into force on the day of its passing. If the Ontario Land Tribunal amends the by-law pursuant to Section 34 (26) of the *Planning Act*, as amended, the part or parts so amended come into force upon the day the Tribunal's Order is issued directing the amendment or amendments.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

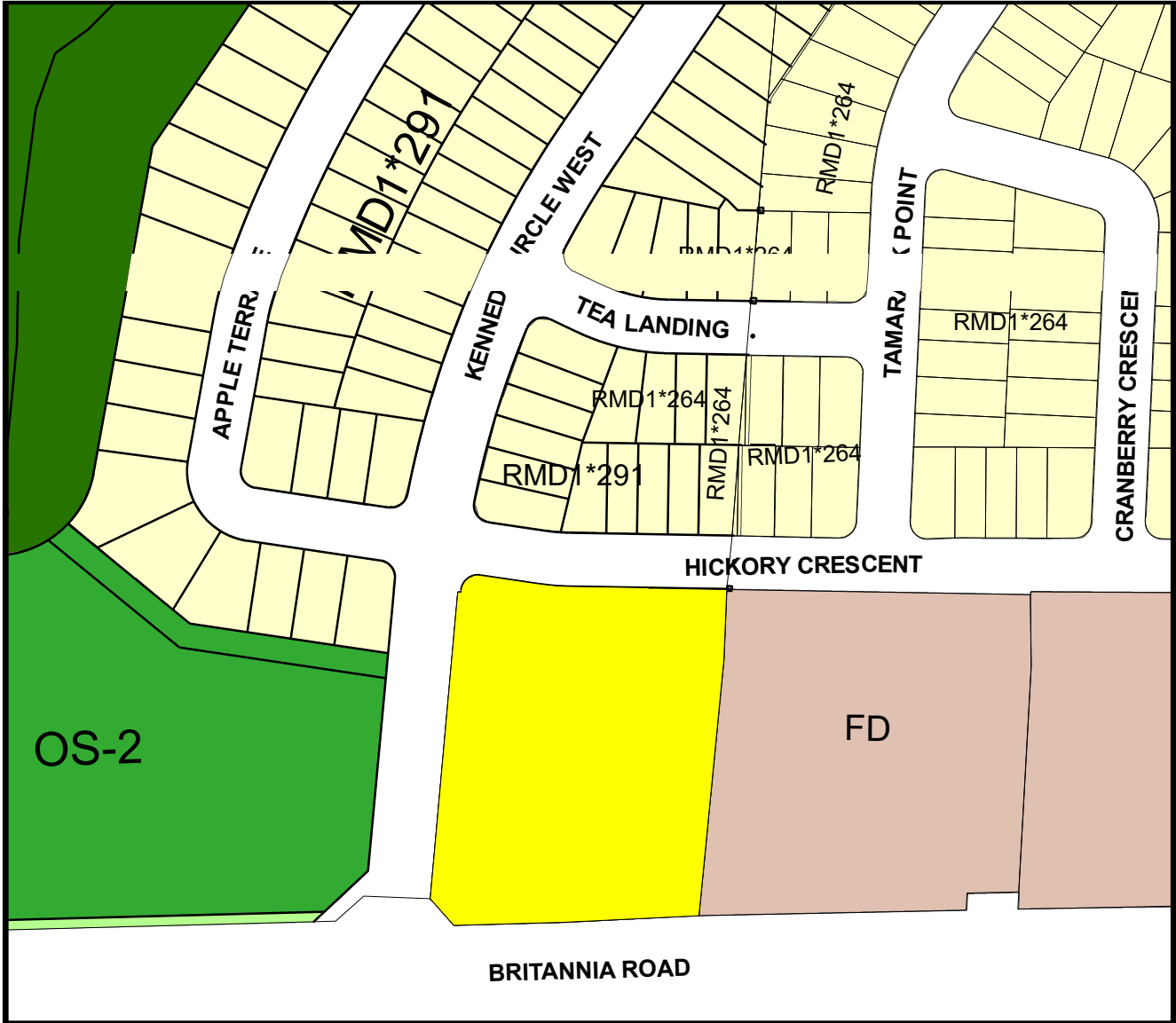
Gordon A. Krantz Mayor

Meaghen Reid Town Clerk

SCHEDULE A
TO BY-LAW NO. 098-2023


TOWN OF MILTON

PART OF LOT 6, CONCESSION 3, N.S
Town of Milton



THIS IS SCHEDULE A
TO BY-LAW NO. 098-2023 PASSED
THIS 18th DAY OF DECEMBER, 2023.



 RMD2*340 - Residential Medium Density II
Special Provision 340

MAYOR - Gordon A. Krantz

CLERK - Meaghen Reid

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW 099-2023

BEING A BY-LAW TO AMEND THE TOWN OF MILTON COMPREHENSIVE ZONING BY-LAW 016-2014, AS AMENDED, PURSUANT TO SECTION 34 OF THE *PLANNING ACT* IN RESPECT OF THE LANDS DESCRIBED AS 150 STEELES AVENUE EAST, PART OF LOT 15, CONCESSION 2, FORMER GEOGRAPHIC TOWNSHIP OF TRAFALGAR, TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (150 STEELES MILTON INC.) – FILE: Z-06/23

WHEREAS the Council of the Corporation of the Town of Milton deems it appropriate to amend Comprehensive Zoning By-law 016-2014, as amended;

AND WHEREAS the Town of Milton Official Plan provides for the lands affected by this by-law to be zoned as set forth in this by-law;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Schedule A to Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by changing the existing Business Park Site Specific (M1*38) zone symbol to the Natural Heritage System (NHS) zone symbol on the land shown on Schedule A attached hereto.
2. If no appeal is filed pursuant to Section 34(19) of the *Planning Act*, R.S.O. 1990, c. P.13, as amended, or if an appeal is filed and the Ontario Land Tribunal dismisses the appeal, this by-law shall come into force on the day of its passing. If the Ontario Land Tribunal amends the by-law pursuant to Section 34 (26) of the *Planning Act*, as amended, the part or parts so amended come into force upon the day the Tribunal's Order is issued directing the amendment or amendments.

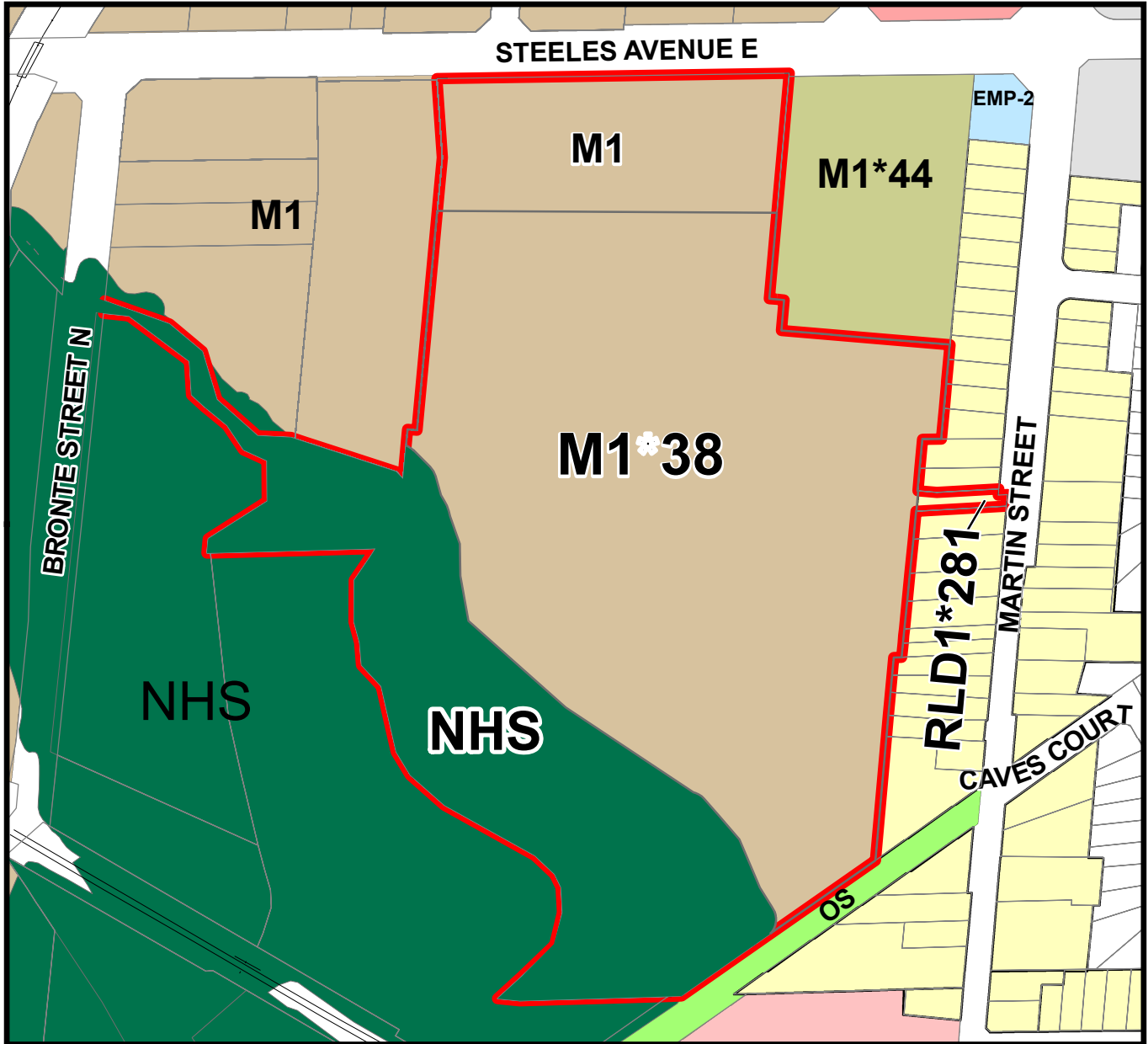
PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

Gordon A. Krantz Mayor

Meaghen Reid Town Clerk

SCHEDULE A
TO BY-LAW No. 099-2023






TOWN OF MILTON
150 Steeles Avenue East
PART OF LOT 15, CONCESSION 2 AND PART OF LOT 6, REGISTERED PLAN 364
Town of Milton



THIS IS SCHEDULE A
TO BY-LAW NO. 099-2023 PASSED
THIS 18th DAY OF DECEMBER, 2023.

MAYOR - Gordon A. Krantz

CLERK- Meaghan Reid

-  RLD1*281 - Site Specific Low Density Residential Zone I
-  M1*38 - Site Specific Business Park Zone
-  NHS - Natural Heritage System
-  M1 - Business Park Zone
-  Subject Lands



THE CORPORATION OF THE TOWN OF MILTON

BY-LAW 100-2023

BEING A BY-LAW TO AMEND THE TOWN OF MILTON COMPREHENSIVE ZONING BY-LAW 016-2014, AS AMENDED, PURSUANT TO SECTION 34 OF THE *PLANNING ACT* IN RESPECT OF THE LANDS DESCRIBED AS 7472 FIFTH LINE, PART OF LOT 13, CONCESSION 5, NEW SURVEY, FORMER GEOGRAPHIC TOWNSHIP OF TRAFALGAR, TOWN OF MILTON, REGIONAL MUNICIPALITY OF HALTON (MENKES MILTON INDUSTRIAL INC.) – FILE: Z-14/22

WHEREAS the Council of the Corporation of the Town of Milton deems it appropriate to amend Comprehensive Zoning By-law 016-2014, as amended;

AND WHEREAS the Town of Milton Official Plan provides for the lands affected by this by-law to be zoned as set forth in this by-law;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. **THAT** Schedule A to Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by changing the existing Future Development (FD) zone symbol to a site specific Business Park (M1*339) symbol on the land and adding the Holding (H) symbol H80 on this property as shown on Schedule A attached hereto.
2. **THAT** Section 13.1.1 of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding Section 13.1.1.339 to read as follows:

Notwithstanding any provisions of the By-law to the contrary, for lands zoned the following standards and provisions shall apply:

- a. Notwithstanding Section 8.1 – Table 8A Permitted Uses, only the following uses shall be permitted:
 - i. Industrial Use;
 - ii. Accessory Outdoor Storage;
 - iii. Office Building;
 - iv. Office Use;
 - v. Research & Technology Use;
 - vi. School, Adult Education;
 - vii. Warehouse/Distribution Centre; and,
 - viii. Wholesale Operation.

b. Special Site Provisions:

For lands zoned Business Park (M1*339) the following additional special site provisions shall apply:

- i. Notwithstanding section 13.1.1.339.A, *Outdoor Storage* is permitted accessory to a permitted *Industrial Use* and/or *Warehouse/Distribution Centre* subject to the required setbacks and lot coverage provisions applicable to the principal use. *Accessory Outdoor Storage* shall be permitted in the *rear yard* and *interior side yard* provided that it is screened from the public street and is not located on any required parking spaces.
 - ii. Notwithstanding the definition of *front lot line*, the *lot line* abutting Main Street East shall be considered the *front lot line*.
 - iii. Notwithstanding the definition of *landscape buffer* and *landscape open space*, landscaping in a *landscape buffer* or *landscape open space* may be located within an easement.
 - iv. Notwithstanding Section 5.8.2, Table 5G, the minimum off-street parking requirement for each individual *Industrial Use* and *Warehouse/Distribution Centre*, including accessory office space, shall be as follows:
 1. For the first 5,000 m², 1 *parking space* per 175 m² of *gross floor area* shall be provided.
 2. For additional *gross floor area* above 5,000 m², 1 *parking space* per 200 m² of *gross floor area* shall be provided.
 - v. Notwithstanding Section 5.11.1, Table 5K, *loading spaces* shall be permitted to be setback up to 17 metres from a *street line*.
 - vi. Notwithstanding Section 5.12, Table 5L, *parking areas* are permitted to be setback within
 1. 0.0 metres from the southerly line; and,
 2. 1.2 metres from westerly property line.
 - vii. Notwithstanding Section 8.2, Table 8B, a minimum front yard of 8.0 metres shall be permitted.
3. **THAT** Section 13.2 (Holding Provisions) of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding the following conditions for removal of this H80 Holding Provision:

“H80” shall not be removed until:

- a) The owner agrees to demonstrate to the Regional Municipality of Halton that local water services are in place and viable for the site at 7472 Fifth Line.

Through the related Site Plan Control process (SP-34/22), the owner shall contact the Regional Services Permit Section for review and approval of the proposed servicing, to obtain a Regional Services Permit, and pay all necessary fees.

- b) The owner submits to the Regional Municipality of Halton Region an environmental audit which indicates that the environmental condition of the site is suitable for the proposed land use and any supplementary remediation/risk assessments to ensure there are no inherent contaminations within the lands prior to any site alteration.

The Owner is required to comply with Ontario Regulation 153/04 and Halton’s Protocol for Reviewing Development Applications with respect to Contaminated or Potentially Contaminated Sites.

4. **THAT** Section 13.2 (Holding Provisions) of Comprehensive Zoning By-law 016-2014, as amended, is hereby further amended by adding subsection 13.2.1.126 as follows:

For lands zoned Business Park Special Provision 339 (M1*339) on the property described as 7472 Fifth Line and legally described as Part of Lot 13, Concession 5, N.S. (Trafalgar), only legally established existing uses are permitted until the conditions for removal identified in the “H80” Holding Provision are satisfied.

5. If no appeal is filed pursuant to Section 34(19) of the *Planning Act*, R.S.O. 1990, c. P.13, as amended, or if an appeal is filed and the Ontario Land Tribunal dismisses the appeal, this by-law shall come into force on the day of its passing. If the Ontario Land Tribunal amends the by-law pursuant to Section 34 (26) of the *Planning Act*, as amended, the part or parts so amended come into force upon the day the Tribunal’s Order is issued directing the amendment or amendments.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

Gordon A. Krantz Mayor

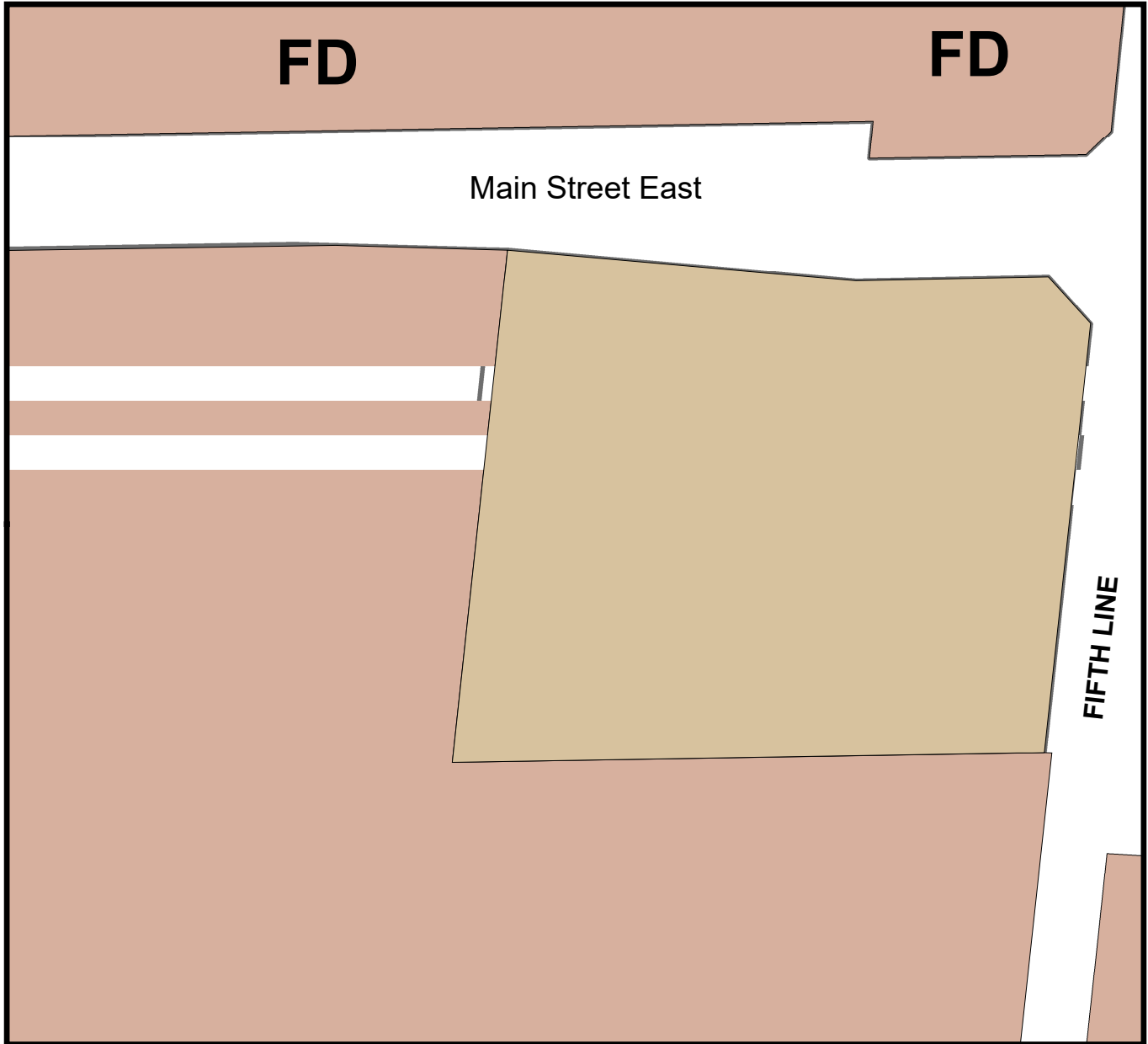
Meaghan Reid Town Clerk

SCHEDULE A
TO BY-LAW No. 100-2023

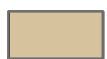
TOWN OF MILTON


7472 Fifth Line
TRAFALGAR CON 5 NS PT LOT 13
RP 20R18236 PARTS 1 TO 3 RP 20R21568 PARTS 2 3 5 7 TO 9 IRREG 6.71AC FR D

Town of Milton



THIS IS SCHEDULE A
TO BY-LAW NO. 100-2023 PASSED
THIS 18th DAY OF DECEMBER, 2023.

 M1*339-H80 - Business Park with Site Specific Provision and Holding Provision 80

 Zone FD - Future Development Zone

MAYOR - Gordon A. Krantz

CLERK- Meaghen Reid



THE CORPORATION OF THE TOWN OF MILTON

BY-LAW NO. 101-2023 SCHEDULE "A"

ITEM	DOCUMENT	APPROVALS	PARTY	OTHER APROVALS
1.	Agreements associated with the approved recommendations contained within the Staff Report and any / all ancillary documents that may be required.	CORS-060-23 Town Council December 18, 2023	Various	N/A
2.	Agreements associated with the approved recommendations contained within the Staff Report and any / all ancillary documents that may be required.	COMS-011-23 Town Council December 18, 2023	Various	N/A
3.	Budget increase for the Trafalgar and Agerton Master Environmental Servicing Plan and any and all ancillary documents that may be required.	DS-057-23 Town Council December 18, 2023	Milton P4 Trafalgar Landowners Group	N/A
4.	For the provision of supplemental transit services and any and all ancillary documents that may be required.	ES-012-23 Town Council December 18, 2023	Wilfrid Laurier University and Conestoga College	N/A

THE CORPORATION OF THE TOWN OF MILTON

BY-LAW NO. 102-2023

BEING A BY-LAW TO CONFIRM THE PROCEEDINGS OF COUNCIL OF THE CORPORATION OF THE TOWN OF MILTON AT ITS MEETING HELD DECEMBER 18, 2023

WHEREAS it is deemed expedient that the proceedings of the Council of the Corporation of the Town of Milton (hereinafter referred to as "Council") at its meeting held on December 18, 2023 be confirmed and adopted by by-law;

NOW THEREFORE the Council of the Corporation of the Town of Milton hereby enacts as follows:

1. The proceedings and actions of Council at its meeting held on December 18, 2023 and considered by Council at the said meeting, and in respect of each Report, Motion, Recommendation and other actions passed and taken by Council at the said meeting are hereby adopted, ratified and confirmed.
2. The Mayor and proper officials of the Corporation of the Town of Milton are hereby authorized and directed to do all things necessary, and to obtain approvals where required, to give effect to the actions passed and taken by Council at the said meeting.

PASSED IN OPEN COUNCIL ON DECEMBER 18, 2023.

_____ Mayor
Gordon A. Krantz

_____ Town Clerk
Meaghen Reid