

**INNISFIL PUBLIC LIBRARY BOARD
MEETING AGENDA
Monday, April 17, 2023 – 7:00 p.m.
Lakeshore Library – Community Room**

1. Call to Order
 - Land Acknowledgement Statement
2. Approval of Agenda (copy & motion)

[Motion #2023. – THAT the agenda of the April 17, 2023 meeting be approved as presented.]

3. Declaration of Interest
None at time of agenda creation
4. Delegations to the Board
 - a) *Misinformation and the Threat to Democracy*, Beatrice Wayne, Research Manager, Samara Center for Democracy
5. Consent Agenda (motion)
 - a) Approval of Previous Minutes (copy)
Recommendation
THAT the March 20, 2023 Board Meeting Minutes be approved as presented.
 - b) Correspondence (copy)
Recommendation
THAT Correspondence Items 5b.01.01 to 5b.03.01 for April 17, 2023 be received.
 - c) CEO Reports (copy)
Recommendation
THAT the CEO Report 5c.01.01 for March 20, 2023 be received.
 - d) Financial Reports (copy)
Recommendation
THAT the Financial Reports 5d.01.01 to 5d.01.02 for March 2023 be received.

Consent Recommendation

[Motion #2023. – THAT the consent agenda items 5 a) to 5 d), and the recommendations contained therein be approved as presented.]

6. Business Arising
None at time of agenda creation
7. Reports
 - a) Municipal Council Report (copy & information sharing)
 - b) Library Board Report (information sharing)
 - c) Board Committee Reports
 - Finance Committee Report (information sharing & motion)

[Motion #2023. THAT the operating and capital financial reports included in the IPL monthly Board agenda package, change to a quarterly reporting model; and FURTHER THAT the Finance Committee will meet and review the financials quarterly, prior to inclusion in the subsequent IPL Board agenda package.]

- d) Health & Safety Update (copy & motion)

[Motion #2023. THAT the minutes of the JHSC March 16, 2023 meeting be received.]

8. Policy
 - a) **EMPLOYMENT** – Reporting Absenteeism & Lateness Policy #E-2023-08 (copy & motion)
[Motion #2023. THAT the EMPLOYMENT – Reporting Absenteeism & Lateness Policy #E-2023-08 be approved as presented.]
 - b) **EMPLOYMENT** – Self Funded Leave Policy #E-2023-09 (copy & motion)
[Motion #2023. THAT the EMPLOYMENT – Self Funded Leave Policy #E-2023-09 be approved as presented.]
 - c) **OPERATING & TECHNOLOGY** – Collection Management Policy #2023-10 (copy & motion)
[Motion #2023. THAT the OPERATING & TECHNOLOGY – Collection Management Policy #2023-10 be approved as presented.]

9. Strategic Issues
None at time of agenda creation

10. New Business
None at time of agenda creation

11. Comments and Announcements
a) Calendar of Events (link)
<https://innisfil.bibliocommons.com/events/search/index>
12. In Camera
No in camera at time of agenda creation
13. Adjournment
[Motion #2023. – THAT the meeting be adjourned]

CORRESPONDENCE LIST for April 17, 2023

5b.01.01	<i>Innisfil's Christmas For Kids</i> , February 28, 2023, Thank you letter for donations received	(copy)
5b.02.01	<i>CBC.ca, Ideas with Nahlah Ayed</i> , March 21, 2023, episode entitled <i>The Librarian Who Won't Stay Quiet</i> https://www.cbc.ca/listen/live-radio/1-23-ideas/clip/15973551-the-librarian-who-wont-stay-quiet	(link)
5b.03.01	<i>CBC.ca, The Sunday Magazine</i> , April 2, 2023, episode entitled <i>Facing Down Dictators, Disinformation and Standing up for Democracy</i> with Maria Ressa https://www.cbc.ca/radio/sunday/the-sunday-magazine-for-april-2-2023-1.6796538	(link)

**INNISFIL PUBLIC LIBRARY BOARD
MEETING MINUTES
Monday, March 20, 2023 – 7:00 p.m.
Innisfil ideaLAB & Library - Lakeshore Branch**

In Attendance: Anne Smith, Rob Nicol, Councillor Jennifer Richardson, Councillor Rob Saunders, Barb Baguley, Sue Bennett Rhonda Flanagan, Cynthia Gordon

Staff in Attendance: Erin Scuccimarri, Susan Baues, Jennifer Miyasaki, Kathryn Schoutsen

Regrets: Raj Grover

1. CALL TO ORDER

- The meeting was called to order at 7:00 p.m.
- Land Acknowledgement Statement was delivered by the Board Chair

2. APPROVAL OF AGENDA

Motion #2023.18

Moved by: Jennifer Richardson

Seconded by: Rhonda Flanagan

THAT the agenda of the March 20, 2023, meeting be approved as presented.

CARRIED.

3. DISCLOSURES OF INTEREST

There were no disclosures of interest.

4. DELEGATIONS TO THE BOARD

- a) ROI Study – Kimberly Silk and Rahul Sabu Joseph, Brightsail Research
 - Kimberly Silk joined the meeting via zoom; Rahul Sabu Joseph joined the meeting in person
 - Slides were shared that outlined the economic impact our library makes in our community
 - A copy of the presentation will be shared with the Board
- b) Digital Media Lab Tour – Rachel Martin
 - Rachel Martin provided a tour of our digital media lab to our Board

5. CONSENT AGENDA

- The CEO highlighted recent interviews that our Board Chair and other community members participated in; CTV has been in our spaces 5 times in the last month to focus on our offerings for all ages
- Patrons have shared good news stories on social media about their experiences in our spaces
- The Deputy CEO commented that we may see more challenged books and that staff will need to be prepared

Motion #2023.19

Moved by: Sue Bennett
Seconded by: Cynthia Gordon

THAT the consent agenda items 5 a) to 5 d), and the recommendations contained therein be approved as presented.

CARRIED.

6. BUSINESS ARISING

a) Donation Reserves

- The CEO provided information on how we receive donations to this account and how funds are spent

Motion #2023.20

Moved by: Jennifer Richardson
Seconded by: Barb Baguley

THAT the 2022 unspent library donations in the amount of \$7,719.02 be allocated to the Library's Donation Reserve Account.

CARRIED.

b) Committee Appointments

- Truth & Reconciliation Committee
 - The Board Chair advised that this will be a standing committee and called for volunteers; a question was posed: can community members join? This will require further consideration at the inaugural meeting
 - Cynthia Gordon volunteered for the committee
 - Chair Smith is Ex-Officio
 - No other volunteers at this time; Chair Smith asked that members consider joining the committee; potential members should advise her or the CEO if they wish to join
- Fundraising Committee
 - Rhonda Flanagan, Jennifer Richardson, and Rob Saunders volunteered
 - Chair Smith is Ex-Officio

- c) Annual Report to Council – April 26, 2023
- The CEO advised that as per the Public Libraries Act, we are required to report to Council annually
 - Request a minimum of 3 members to help with the presentation
 - Chair Smith, Sue Bennett, Cynthia Gordon and Rob Nicol volunteered
 - A meeting will be held to discuss next steps for the presentation

7. REPORTS

- Municipal Council Report
 - A report was shared with the package
 - Councillor Richardson commented on her attendance at the recent Orbit meeting
- Library Board Report
 - Board members shared information, comments and announcements regarding library and community initiatives, events and experiences
- Multi-Year Accessibility Plan Progress Report 2022

Motion #2023.21

Moved by: Rob Nicol
Seconded by: Rob Saunders

THAT the Multi-Year Accessibility Plan Progress Report 2022 be received.

CARRIED.

- Staff Report LIB-02-2023 TikTok Privacy, Security and Misinformation.
 - Councillor Richardson asked about alternative ways to reach the youth audience; Library staff advised that we are looking at other social media options

Motion #2023.22

Moved by: Jennifer Richardson
Seconded by: Rhonda Flanagan

THAT the Staff Report LIB-02-2023 TikTok Privacy, Security and Misinformation be received.

CARRIED.

- Health & Safety Update
 - The JHSC Minutes were provided in package

Motion #2023.23**Moved by:** Cynthia Gordon**Seconded by:** Sue Bennett

THAT the minutes of the JHSC February 9, 2023 meetings be received.

CARRIED.**8. POLICY**

a) **BOARD** – Code of Ethics Policy #B-2023-05

(copy & motion)

Motion #2023.24**Moved by:** Rob Nicol**Seconded by:** Cynthia Gordon

THAT the BOARD – Code of Ethics Policy #B-2023-05 be approved as presented.

CARRIED.

b) **EMPLOYMENT** – Paid Holidays Policy #E-2023-06

(copy & motion)

Motion #2023.25**Moved by:** Barb Baguley**Seconded by:** Rhonda Flanagan

THAT the EMPLOYMENT – Paid Holidays Policy #E-2023-06 be approved as presented.

CARRIED.

c) **EMPLOYMENT** – Active Lifestyle Policy #E-2023-07

(copy & motion)

Motion #2023.26**Moved by:** Jennifer Richardson**Seconded by:** Sue Bennett

THAT the EMPLOYMENT – Active Lifestyle Policy #E-2023-07 be approved as presented.

CARRIED.**9. STRATEGIC ISSUES**

There were no Strategic Issues to discuss this month.

10. NEW BUSINESS

a) Bank Account Signing Officers

Motion #2023.27

Moved by: Sue Bennett

Seconded by: Rob Saunders

THAT the Board approves the required Corporate Resolution as provided by TD Canada Trust on Form 592014 (1021) A, which designates the Library's Board Chair, Board Vice-Chair, CEO and Manager, Digital Services as signing officers of the Innisfil Public Library Board's Bank Account.

CARRIED.

11. COMMENTS AND ANNOUNCEMENTS

a) Calendar of Events

- Link to Library offerings was provided in the agenda

12. IN CAMERA

No In Camera

13. ADJOURNMENT

Motion #2023.28

Moved by: Barb Baguley

THAT the meeting be adjourned at 8:56 p.m.

CARRIED.

DATE OF THE NEXT MEETING

The next Library Board meeting will be held on

Monday, April 17, 2023 at 7:00 p.m.

Innisfil Public Library & ideaLAB – Cookstown Branch – Community Room

Anne Smith, Board Chair

Erin Scuccimarri, Secretary



Christmas For Kids (All Year Round)

219 Bayshore Road Churchill ON

Myrlene Boken (705)456-6731 Debra Harrison (705) 627-6952

February 28, 2023

Innisfil Public Library
Stroud Branch
7883 Yonge St,
Innisfil, ON
L9S 1K8

Dear Library Staff:

Thank you so much for all your assistance again this year. Thank you for allowing us to have a drop box in the library. We always receive such wonderful gifts. We get the wish lists from each child and teen; we want them to enjoy the anticipation that they will get something from their Christmas wish list. This year we received so many wonderful gifts from our drop boxes that we did not have to do a lot of extra shopping. We also appreciate the cash donations and gift cards that came in, we use a lot of the money to buy extra food and gift cards for our teens. Please let all your employees know how much we appreciate their assistance with everything.

In the end we assisted 191 families including just over 700 people, mostly children and teens, an increase of 25% over last year. This also included 14 families from Elizabeth Fry. Because they are transient in terms of a permanent address, they have problems getting an organization to help them. Included in this number were 43 vulnerable teens through the local highschool. The need is huge, rising costs of food, gas, and rent, have made it impossible for many to afford necessities. We assisted 42 families with Easter Dinner, 123 children got Easter Baskets, 40 families with Thanksgiving dinner. We handed out 174 coats, 175 pairs of boots, 60 pairs of indoor shoes, another 63 families required help with various things from crisis assistance (52), help with graduation (6), and birthday presents (15) from our left-over Christmas toy stock. We also worked with a local artist to distribute supplies to 30 children for a zoom art class designed to relieve stress.

We hope you all have a great year, and hopefully we can work together again next year.

Kindest Regards

Myrlene Boken
President

Innisfil's Christmas for Kids

We Believe in the Magic of Christmas for Kids (all year round)

MAR 2023 CEO REPORT



SAFE & WELCOMING SPACES

English Conversation Circle

Earlier this year, new findings from the 2021 census data were shared with Library Staff via the Simcoe County Local Immigration Partnership (SCLIP). Innisfil is not only experiencing significant population growth, but significant growth of our newcomer population. Based on the 2021 Census data, there were 82,290 immigrants living in Simcoe County, representing 15.7% of the population. This is a 33.6% increase from 2016 when new immigrants represented just 13.1% of the population. In comparison, the immigrant population grew 33.6% from 2016, and the total population in Simcoe County grew just 11.2%.

Library Staff learned through the SCLIP that, while there has been a remarkable increase of individuals in our community who speak a non-official mother-tongue, funding for English as a Second Language (ESL) classes has decreased. We also learned that the Simcoe County District School Board's adult learning centres, which provide critical skills enabling newcomers to thrive in our communities, have enormous training waitlists. Over 7,000 Innisfil residents have a first language that is not English or French; a dramatic increase of 60% from 2016 to 2021.

Library Staff embraced our role as a community hub and quickly mobilized, reaching out to various community partners and community members to identify ways in which the Library could support our newcomer residents and fill some of the language gaps by initiating a community-led English Conversation Circle. Staff connected with the YMCA Newcomer Services and the Nantyr Shores Secondary School Multilingual Learning Facilitator to assist us. Staff members, who are fluent in languages other than English, reached out to community members they knew would benefit from an English Conversation Circle.

English Conversation Circles now take place every Thursday evening at the Lakeshore branch. The first session took place in March and saw 16 participants. Learners of all levels were able to practice speaking and listening in a safe, fun and relaxed environment.



Open UP opportunities to strengthen connection & engagement with our community

OUTREACH & ENGAGEMENT

YMCA Innisfil Silver Club

Who knew how popular fascinators could be?! On March 23rd, Library Staff visited the YMCA Silver Club bringing materials and tools to make fascinators. Ten participants flocked to the Library table to make their very own fascinator hat, testing the limits of how much hot glue can be used in an hour.

One participant was so fascinated by the fascinators - she said, "It's amazing what you can do with a paper plate! What a great crafting idea!" The participants proudly displayed their creative efforts, and were delighted to show off their fascinators in a photoshoot at the end of the session. The Silver Club organizer noted, "They just love it when you come, they get all excited." Meeting seniors where they already gather is an important component of building trusted relationships with Innisfil's older adults.



 Showing off their completed pieces

Build UP our reputation as a trusted community asset

COLLECTIONS

Platform and Access Changes for Digital Collections

The County migrated their ebook collection from the Overdrive platform to the [Cloud Library](#) platform at the end of March. The Library already subscribes to Cloud Library independently, therefore many customers will not need to learn a new platform; however, customers but will lose access to Overdrive going forward. Cloud Library provides access not only to the titles purchased by the Library, but also to those owned by other public libraries in Ontario when they are available, resulting in access to more than 120,000 titles.

Relocating Titles for Easier Access

Two new sub-collections were created at the Lakeshore Branch in March in order to facilitate greater access. Non-fiction titles targeted at teens were relocated to the young adult collection. The majority of these titles relate to physical and mental health, and teens would have been unlikely to find them in the adult collection.

Similarly, graphic novels for adults were located in the non-fiction collection, and are now grouped together in a single location. While it is currently a very small collection, Library Staff plan to grow the collection over the coming months to better serve readers who prefer this format. Many children and young adults have become familiar with the format through the Library's juvenile and young adult collections, and will be able to move into the adult collection as they grow as readers.



Adult Non-Fiction Weeding Guidelines

Collection Services developed a new Adult Non-Fiction Removal Procedure, which will guide the de-selection process for non-fiction items. The procedure features a continuous collection assessment approach based on subject area, and relies on regular circulation reports and an annual schedule. Items are removed to ensure the collection remains accurate and reliable; stays in good physical condition; meets the needs and interests of the community; and provides space for new items. Ongoing evaluation is also important to ensure the collection supports the Library's programs and services. Collection assessment by Staff is necessary as books are not always fact-checked by publishers, such as *The Book of Animal Secrets* by Dr. David Agus, which was recently recalled due to plagiarism that was not discovered until after publication. These guidelines and processes are an important step in our strategic plan commitment to build up our reputation as a trusted community asset through combatting "fake news" and misinformation. They help the Library ensure our community members have access to trusted, safe and reliable information resources.

Items will be evaluated for withdrawal based on the following factors:

- Obsolescence of information
- Quality, accuracy and reliability of information
- Number of copies in the collection
- Circulation or in-house use over the last 2 to 5 years
- Adequacy of other resources in the subject area to meet customer needs
- Ease of replacement by purchasing another copy or similar resource
- Availability of the resource or information outside the Library, including whether it can be accessed online or through interlibrary loan

Staff will use a variety of strategies, including regular assessment and weeding of the non-fiction collection based on circulation data, and the Library's Non-Fiction Removal procedure.





Raise UP the Library's identity as an innovative hub

HANDS-ON DIGITAL LITERACY

Tinkershops for Young Makers

New and popular Tinkershop programs in the HackLAB have been designed with budding, young makers in mind. These workshops focus on coding as well as learning to use the various tools available in the Library's HackLAB, promote problem-solving skills, encourage creativity and innovation, build confidence and foster a love of life-long learning.

Learning coding skills continues to be a priority for young patrons, especially when packaged within Tinkershop topics such as, Drawing Music, Make Your Own Video Game, and multi-week CodeJams. The excitement at gaining the ability to create video games is a very powerful motivator; although young makers typically start at the most basic level of complexity, it helps them to appreciate all the work that goes into their daily entertainment sources.

March held the beginning of MakerKids, a six week program, which was so popular that 24 children were on the waitlist, despite the fact that it was being offered at two different branches. Participating children learned to design for many of the HackLAB machines, such as the laser cutter, the sublimation printer, the vinyl cutter, and more. This beginner level series of programs creates opportunities to introduce young makers to the tools and digital concepts required to use the HackLAB.

A Very Maker March Break

One of the most popular programs offered over March Break was 3D Design LEGO Master Builders, with a waitlist that was quadruple the capacity of the program. Participants explored accessible 3D design tools that would allow them to plan really large LEGO brick constructions, based on a complex 3D shape. Kids were also able to explore first-hand, drawing short animated cartoons the old-fashioned way, to be brought to life within their own spinning zoetrope kits. Make & Take Laser Cut Mini Catapults was a success for those that could not otherwise book a spot in a Tinkershop. This drop-in program provided a good introduction to the HackLAB and a tour of the kinds of projects that they can look forward to producing as they grow older and build their HackLAB skills.



ICE HUT ART


Project Wrap Up

The second Ice Hut Art project season has come to a close. The project aimed to promote art and culture, foster community engagement and create an exciting winter experience for residents and visitors. The project was a collaboration between the Library, Town of Innisfil, Gail's Hot Box Huts and local artists. The venture provided a unique opportunity for local artists to showcase their work and transform ice huts each with a different design, ranging from realistic representations of nature to various ice fishing landscapes. The huts were displayed in Innisfil Beach Park and on the frozen Lake Simcoe from November 2022 to March 2023, creating two outdoor art installations in Innisfil.

Funded by the County of Simcoe 2022 Tourism, Culture and Sport Enhancement Fund, the Ice Hut Art project was a successful initiative that achieved its objectives of promoting art and culture, community involvement, and creating a unique winter experience for residents and visitors. The project received significant participation and had a positive impact on the community getting residents outdoors during the winter season while discovering public art in Innisfil. The project also generated positive media coverage, which helped to promote Innisfil as a vibrant, creative community along with providing an opportunity for the Innisfil ideaLAB & Library to showcase its resources and services to the community. A selection of media outreach and response is available in [Appendix B](#).

The Ice Hut Art project was a valuable addition to Innisfil's cultural landscape, and we are looking at ways for the project to be continued in future years.



 *Ice huts on display in Innisfil Beach Park formed an outdoor art gallery.*



Light UP pathways to personal & professional growth

MARCH INTO MARCH BREAK

Children's Programs from Kindergarten to Tweens

During March Break 2023 we offered a variety of programs to spark children's imagination and creativity for different age groups at all three of our branches.

In Curious About Colours, Parachute Party, and Bouncing Balloons & Bursty Bubbles, kindergarten-aged children learned about and explored colours through stories, songs, and crafting. Using the large parachute and balloons, participants were engaged in kinesthetic learning using their whole bodies in follow-the-leader and group activities, as well as having their listening ears turned on to make sure everyone had a great time. All of these programs involved teamwork and collaboration within the groups, so the little ones were able to practice their social skills by helping and supporting their friends, as well as working together to accomplish a goal. They were also introduced to some of the robots we have available at the library, learning some beginner coding with BlueBot and Code-a-Pillar.



For our primary and intermediate school-aged children, Become a Fantasy Hero and Discover D&D provided opportunities to use their imagination and creativity to create fantasy stories, individually in one program, and collaboratively in the other. In addition to creating stories, the participants in Become a Fantasy Hero were able to create a map for their story; one friend is even planning to use it



in the Short Story Contest later this year, as well as incorporating technology into their stories by adding an Ozobot to their map. An Ozobot is a small robot that is coded using different coloured markers. In Discover D&D, we had some participants who were new to *Dungeons & Dragons*, as well as some who had played before. *Dungeons & Dragons* is a collaborative, roleplaying storytelling experience where participants get to design their own character and create the story together, with the Dungeon Master (the programmer!) providing the setting and obstacles for the players.



In Wondrous WeDos, Cricut for Kids, and Rock Painting, our older school-aged friends and teens used their creative sides to build and code their own robots with Lego, create stickers and decals with Cricut Design Space, as well as express themselves artistically with an all-ages friendly medium.

A common theme throughout the week was participants wanted to stay well past the end of programs because they were enjoying them so much. March Break was full of positive energy and smiles from our library families!

March Break Special Guests

In addition to staff-run programs, the Library hosted special guest presentations and performances to keep families engaged and entertained and to build community connections.

Mystic Drumz

Lorne from Mystic Drumz joined us at both the Lakeshore and Cookstown locations, teaching kids of all ages, as well as caregivers and grandparents, about rhythm and how to play a variety of percussion instruments. After learning the basics, the whole group was able to play a couple different songs together, following Lorne's lead; then he finished up with a rhythm and dance party. Lots of families shared that they had so much fun!



Storytime with Innisfil Fire

Fire Prevention Inspector Taylor from Innisfil Fire read a story about firefighting and brought Sparky the dog! All of the little ones were invited to pick up a firefighter hat and give Sparky a high five at this special Storytime.

Special Family-Friendly Song Circle

The local Song Circle organized weekly by Miss Patty invited Library goers of all ages to join in on the Friday morning of March Break. Library staff provided extra instruments in the form of egg shakers, bells, and tapping sticks for everyone to participate in the music.

Sweet as Icing: Cookie Decorating with Mad Hatter's Table

Mad Hatter's Table in Cookstown provided delicious cookies, bags of icing, sprinkles, and a baker to help decorate some cookies! We had some cardstock stencils cut out from the Cricut and step by step instructions different styles of decorations for the participants to try out; some children didn't want to eat the cookies because they wanted to show off their creative designs!



SPRING AUTHOR SERIES RETURNS

Let's Bake with Gail Sweeney

The Spring Author Series is an opportunity for the Library to host talented authors from the surrounding region, and beyond. This year, the series spans March to May, and includes Gail Sweeney, a local cookbook author, Jessica Hamilton, an author of thrillers, and Catherine Hernandez, the acclaimed author of *Scarborough*.



On March 25th we hosted Gail Sweeney for a lovely and supportive talk, in which so many attendees came to admire Gail's work. Gail took the attendees through all that she had learned in the process of bringing her cookbook *Let's Bake* to life. What began as a hobby for Gail, eventually brought her to selling cookies and sweet treats under the business name "More than a Cookie". With the recipes she honed throughout this process, she began to look for a publisher to commemorate all that she had learned. She was able to sign with Hatherleigh Press, and then began to refine her recipes for the cookbook format.

15 Layer Crepe Cake



End Result



excerpt from Gail's slideshow

The talk covered how she takes appealing photos without access to a studio kitchen, and so many tips and tricks to make your baking stand out. The latter topic was a treasure trove of delightful information! The audience was excited for the chance to ask follow up questions from the blunt, "When can I buy this book?", to the detailed "How do you make dried pineapple flowers?".

The Spring Author Series continues in April with Jessica Hamilton, and Catherine Hernandez in May.

Confidently Computing

In the Confidently Computing program we provide instructions in a class setting for a range of different computer programs and tools. Typically, the classes include an informational presentation, a live interactive demonstration of the tool, accompanied with a printed tip sheet. In the case of the recent Confidently Computing: Intro to Microsoft Excel, the attendees were very serious about learning Excel! They were motivated to brush up on some old skills for various reasons, from building skills so that they could be a good treasurer for their church's community group to brush up on old knowledge and re-enter the workforce. We reviewed the many features and functions of Excel through building a simple monthly budget calculator. We explored how to enter formulas manually, as well as using all manner of shortcuts in order to impress and dazzle others with our spreadsheeting abilities. In this class, like many others, the topic is a great springboard into deeper computer knowledge, with the class as an opportunity to practice computer skills more generally, while asking questions.

STAFF DEVELOPMENT

Resisting Book Bans: A Crash Course to Defend Intellectual Freedom

Collections Staff attended this session from the Library Journal aimed at helping Libraries prepare for Book Bans. Staff identified strategies to strengthen the Collection Development Policy through annual review.

APPENDIX A:

Level UP! Communications Insights

Media Outreach & Social Media Response

DATE PUBLISHED	NEWS OUTLET	TITLE
Mar. 2, 2023	CTV Barrie	Seniors in Innisfil, Ont. are going to the birds
Mar. 3, 2023	Simcoe.com	'A more holistic look': Town of Innisfil to return later this year with more flooding strategy open houses
Mar. 5, 2023	CTV Barrie	Innisfil ideaLAB and Library brings song circle indoors
Mar. 6, 2023	CTV Barrie	Innisfil Song Circle
Mar. 8, 2023	CTV Barrie	Innisfil Farmers' Market gets funding for 2nd Community Services Day
Mar. 17, 2023	Barrie Today	Innisfil Seed Library sprouting into eighth season
Mar. 17, 2023	Bradford Today	Plenty of activities still on tap as March Break winds down
Mar. 23, 2023	Barrie Today	Spring Author Series kicking off at Innisfil ideaLAB
Mar. 30, 2023	CTV News	Innisfil Seed Library

Facebook Insights (March 1 to 31, 2022)

FOLLOWERS	# OF POSTS	TOTAL ENGAGEMENT	TOTAL IMPRESSIONS
3,706 (Followers) 3,076 Page Likes	59 during this period	1,219 engagements (1,077 reactions, 64 shares, 78 comments)	Posts earned 18.6K impressions over this period (number of times our posts have entered a person's screen)

Top Organic Post (based on reach):

Date, Mar. 10, 2023 6K Reach

Thank you to [Johnny Burger](#) for dropping off 500 pounds of potatoes to the [#Innisfil](#) Troy Scott Community Fridge at our Lakeshore Branch!

We are so thankful to our community for helping those in need. If you would like more information about the [#Innisfil](#) Troy Scott Community Fridge, visit <https://bit.ly/3U39XvC>



Twitter Insights (March 1 to 31, 2022)

FOLLOWERS	# OF TWEETS	TOTAL ENGAGEMENT	TWEET IMPRESSIONS
1,546	40 during this period	105 engagements (78 likes, 19 retweets, 5 quote tweets, 3 reply) 18 Mentions	8.5K impressions over this period (number of times users saw our tweets)

Top Organic Post (based on reach):

Top Tweet earned 731 impressions

Top Tweet earned 731 impressions

If you're able to donate to the Community Fridge at our Lakeshore branch, our neighbours in need would appreciate it!

Visit innisfil.ca/en/living-here... for donation guidelines!

#FeedInnisfil #Innisfil
pic.twitter.com/Yswpbok0U0



2 4

Instagram Insights (March 1 to 31, 2022)

FOLLOWERS	# OF POSTS	TOTAL LIKES & REACH	TOTAL COMMENTS
1,892 (+37)	38 during this period	1,895 accounts reached. 716 likes.	13 comments in total on content posted during this period

Top Post (based on engagement): March 6, 2023 380 Reach




innisfilidealab


innisfilidealab We're hiring a Library Programmer!
As a programmer, you will be responsible for providing programs for children, adults and seniors like running a preschool storytime, filming videos with technology tips, and creating seniors craft kits!
Visit <https://bit.ly/3Y6U2hR> to apply by March 10.
4w

[View insights](#)
[Boost post](#)







Liked by wesayrantorealestate and 15 others
MARCH 6


Add a comment...
Post

Top Reel (based on engagement): March 15, 2023 792 Reach



innisfilidealab
Original audio



innisfilidealab Have you had a chance to visit the #IceHutArt Project?

The #icehuts will be coming off the ice today, but you can still head over to #Innisfil Beach Park to see this year's huts on land!

Can't make it in person? Watch the full video here:
<https://youtu.be/sFUHKLwoATo>

The 2022/23 #IceHutArt Project is in partnership with @townofinnisfil and @hotboxhuts and is supported by @experiencesimcoecounty

#CultureInnisfil #ExperienceSimcoeCounty

2w



tonythenonno Pop up fishing tent is the way now with unprecedented climate change.



Boost post



Liked by townofinnisfil and 30 others

MARCH 15



Add a comment...

Post

APPENDIX B:

Ice Hut Art Media Outreach and Response

May 24, 2022	Simcoe.com	Town of Innisfil seeking artists for ice hut public art installation project
May 24, 2022	Innisfil Today	Applications now open for this year's Ice Hut Art project
Nov. 21, 2022	Ontario Morning From CBC Radio With Ramraajh Sharvendiran	The Ice Hut Art Festival returns to Innisfil
Nov. 22, 2022	Simcoe.com	'Share your hopes for the future': Hope Tree lit, ice hut art unveiled at Innisfil Beach Park
Nov. 22, 2022	Barrie Today	Igniting hope, artistry and community at Innisfil Beach Park
Nov. 23, 2022	CTV News Barrie	Innisfil Ice Hut Art Returns
Nov. 28, 2022	FM92 South Simcoe Today	Ice Hut Art is Back
Dec. 1, 2022	Cottage Life	This ice fishing hut art is unbelievable

Jan. 6, 2023	CTV News Barrie	Turning Ice Huts into Art 24:23 for your segment
Jan. 18, 2023	Outdoor Canada	These 11 Artist-Painted Fishing Huts On Ontario's Lake Simcoe Will Brighten Winter Days On The Ice
Jan. 25, 2023	Barrie Today	Plenty of activities on tap during Winter Weekends in Innisfil
Mar. 14, 2023	YouTube	Drone video production shared to Social Media

Innisfil Ice Hut Art Project YouTube Video



InnisfilToday

November 22, 2022 · 🌐

...

The art installation of ice box huts will be on display at Innisfil Beach Park until March 2023



INNISFILTODAY.CA

Igniting hope, artistry, and community at Innisfil Beach Park

The art installation of ice box huts will be on display at Innisfil Beach Park until March 2023

👍 16

1 comment 1 share

All comments ▼



Laurel Woodrow

I can see that with all these great people the ice hut project will be stunning this year!!!

LAUREL Woodrow

Like Reply 32w

👍❤️ 4



Uplift Black

Happy to be involved again this year. Congrats to the artists chosen!

Like Reply 32w

👍❤️ 3



Cottage Life

December 2, 2022 · 🌐



There are ice fishing huts, and then there are these amazing works of art located on and near Lake Simcoe.



COTTAGELIFE.COM

This ice hut art is unbelievable

Last year the Town of Innisfil collaborated with local artists to present a dazzling display of pai...

👍❤️😮 58

9 comments 15 shares

Cottage Life's Post

Last year the Town of Innisfil collaborated with local artists to present a d

   58

 Like

 Comment



Susanne Bradshaw

Wow looks awesome good job ❤️

Like Reply 17w



Kathy Gordy

Nicely done. The old white ones were hard to find in the snow and

Like Reply 15w




Elisabeth Verburg

Good idea!

Like Reply 17w



Holly Westbrook

Patrick McGuire 

Like Reply 17w



Patrick McGuire

Holly Westbrook hell of a way to intrigue them perch

Like Reply 17w


  2

 21

1 comment 4 shares

 Like

 Comment

 Share



Most relevant ▼



Judith Rogers

Nice to see this feature, maybe other communities will do the same.

Like Reply 15w



OOD contributor Geoff Coleman recently photographed a public ice hut art installation in Innisfil. Folks are all looking forward to seeing huts on the ice, once it's safe enough. 1/2

innisfilidealab.ca/ice-hut-art/
[@InnisfilideaLAB](https://twitter.com/InnisfilideaLAB)



12:37 PM · Jan 19, 2023 · 37 Views



Patrick Walsh @OutdoorWalsh · 20m

...

Such a great idea! I hope it becomes an ongoing winter tradition on [#LakeSimcoe](#). Kudos to [@townofinnisfil](#) [@InnisfilideaLAB](#) & [#GailsHotBoxHuts](#).



[outdoorcanada.ca](#)

These 11 artist-painted fishing huts on Ontario's Lake Simcoe will brigh...
Advertisement Hardwater anglers have often gussied up their ice huts,
but Innisfil, Ontario, on the western shores of Lake Simcoe has truly ...



Ontario OUT of DOORS Magazine · Follow

January 19 · 🌐

...

OOD contributor Geoff Coleman recently photographed a public ice hut art installation in Innisfil. Folks are all looking forward to seeing huts on the ice, once it's safe enough.

<https://www.innisfilidealab.ca/ice-hut-art/>

Innisfil Idealab & Library

#Hunting #Fishing #Outdoors #Innisfil #SimcoeCounty #LakeSimcoe #IceFishing #PublicArt #IceHutArt #OutdoorInstallation #ArtyParty #IceSafety #CultureInnisfil



👍 25


1 comment 13 shares

  You and 27 others

4 comments 5 shares

 Like

 Comment

 Share



Most relevant ▼




Maria Mash

Such a beautiful ice hut!! Love it!

Like Reply 14w



Melanie Graham

Beautiful work 

Like Reply 14w



Darlene Rowland

I love your artwork . You are very talented .
Thanks for sharing your ideas with Innisfil

Like Reply 14w



Hannatess ArtHaus · [Follow](#)

That was such a treat to work on , and I can't thank the organizers enough for putting this project together.

Like Reply 14w





As Seen by Everyone · Follow

February 24, 2022 · ⚙️



Welcome to the Ice Hut Art displays; if you were not able to go out and view these Ice Huts, all I can say is that we have very talented artists living among us here in Innisfil and the area. We made this video for all of Innisfil to enjoy. We hope you love and enjoy our video, a great experience for me going out to each location and filming these. We decided that a video would make the viewing more enjoyable for you. At the time of production, three huts were not ready but have posted some pictures for their work. [#innisfil](#) [#simcoecounty](#) [#art](#) [#video](#) [#talented](#) [#artists](#) [#icehuts](#) [#icefishing](#) [#barrie](#) Daniel Davidson [Kenneth Fowler](#) @Mayor Lynn Dillon. Thank you to Hot Box Huts, Innisfil Idealab & Library, Innisfil Arts, Culture and Heritage Council, UPlift Black - Social Engagement Chat Group, Barrie and Area Native Advisory Centre along with the Town of Innisfil, Innisfil Idealab & Library for helping shine a light on the talent our community possesses.



👍❤️😂 17

7 comments 25 shares



Cottage Life

March 9 at 6:00 AM · 🌐



You've got to check out this cool ice fishing hut art:



COTTAGELIFE.COM

This ice fishing hut art is unbelievable

Last year the Town of Innisfil collaborated with local artists to present a dazzling display of pai...



Hot Box Huts · [Follow](#)

March 15 at 2:29 PM · 🌐



🔥 There are no words to describe how happy we are to have been part of this project for the last 2x years 🔥

What a great video featuring ALL of the art huts and some wicked drone shots of HawgTown 🙌

Click link below to check them out 📌



YOUTUBE.COM

Innisfil Ice Hut Art Project 2022/2023

The Innisfil ideaLAB & Library, in partnership with the Town of Innisfil and local ice fishing hut ...



27

1 comment 1 share



Corporation of the Town of Innisfil
Budget to Actual Variance Report - Operating
For the Period Ended March 2023
Library

5d.01.01

	2023	Year to	YTD Actual as	Budget-Actual
	Total	Date	a Percent	Year to Date
	Budget	Actuals	of Budget	Remaining
Library				
Library Operating				
Revenue				
Registration & Facility Fees				
Facility Rental				
4438 Hall Rental	-10,000	-6,204	62.04%	-3,796
Total Facility Rental	-10,000	-6,204	62.04%	-3,796
Registration Fees				
4464 Programming	-23,000	-5,535	24.07%	-17,465
Total Registration Fees	-23,000	-5,535	24.07%	-17,465
Total Registration & Facility Fees	-33,000	-11,739	35.57%	-21,261
User Fees, Licences and Fines				
User Fees				
4447 Misc. Revenue	-30,000	-4,431	14.77%	-25,569
4490 Photocopy Etc.	-7,500	-2,818	37.57%	-4,682
4491 Books	-2,800	-1,040	37.14%	-1,760
4492 ideaSHOP sales	-2,000	-24	1.20%	-1,976
Total User Fees	-42,300	-8,313	19.65%	-33,987
Total User Fees, Licences and Fines	-42,300	-8,313	19.65%	-33,987
Other				
Government Grants				
4100 Grants - Ontario	-45,922	-267	0.58%	-45,655
Total Government Grants	-45,922	-267	0.58%	-45,655
Total Other	-45,922	-267	0.58%	-45,655
Transfer from Reserve & Reserve Funds				
Contributions from Obligatory RF				
492507 Oblig.RF-Library DCA	-166,961	-84,398	50.55%	-82,563
492515 Oblig.RF-Parks Indoor DCA	-12,143	-6,138	50.55%	-6,005
Total Contributions from Obligatory RF	-179,104	-90,536	50.55%	-88,568
Total Transfer from Reserve & Reserve Funds	-179,104	-90,536	50.55%	-88,568
Total Revenue	-300,326	-110,855	36.91%	-189,471
Expenditures				
Wages & Benefits				
Wages & Benefits Permanent				
5010 Salaries - (FT)	2,053,948	404,634	19.70%	1,649,314
5100 Benefits (FT)	610,952	121,391	19.87%	489,561
Total Wages & Benefits Permanent	2,664,900	534,845	20.07%	2,130,055
Wages & Benefits Non-Permanent				
5011 Salaries - (PT)	330,869	125,781	38.02%	205,088
5102 Benefits (PT)	78,524	14,411	18.35%	64,113
5103 Benefit Clearing (PT)	0	8,006	0.00%	-8,006
Total Wages & Benefits Non-Permanent	409,394	148,198	36.20%	261,196
Total Wages & Benefits	3,074,294	683,043	22.22%	2,391,251
Materials & Supplies				



Corporation of the Town of Innisfil
Budget to Actual Variance Report - Operating
For the Period Ended March 2023
Library

	2023	Year to	YTD Actual as	Budget-Actual
	Total	Date	a Percent	Year to Date
	Budget	Actuals	of Budget	Remaining
Facility/Park Maintenance				
7080 Cleaning Supplies	9,000	1,063	11.81%	7,937
7180 Facility/Parks Maintenance	57,603	4,346	7.54%	53,257
Total Facility/Park Maintenance	66,603	5,409	8.12%	61,194
Advertising & Publicity				
7020 Advertising & Publicity	8,865	85	0.96%	8,780
Total Advertising & Publicity	8,865	85	0.96%	8,780
Clothing				
5210 Clothing/PPE	675	0	0.00%	675
Total Clothing	675	0	0.00%	675
Education, Seminars & Memberships				
5230 Education & Development	20,000	4,340	21.70%	15,660
7300 Prof. Dues & Memberships	2,993	505	16.87%	2,488
Total Education, Seminars & Memberships	22,993	4,845	21.07%	18,148
Equipment Maintenance				
7140 Equipment Maintenance	2,200	3,007	136.68%	-807
Total Equipment Maintenance	2,200	3,007	136.68%	-807
Fuel				
7200 Fuel	1,846	0	0.00%	1,846
Total Fuel	1,846			1,846
Office, Printing & Postage				
7040 Books/Publications/Subscriptio	0	0	0.00%	0
7360 Office Supplies	9,296	2,668	28.70%	6,628
7400 Photocopy	10,000	1,073	10.73%	8,927
7440 Postage	1,000	221	22.10%	779
7460 Printing	7,240	0	0.00%	7,240
Total Office, Printing & Postage	27,536	3,962	14.39%	23,574
Insurance				
7220 Insurance	54,247	11,271	20.78%	42,976
Total Insurance	54,247	11,271	20.78%	42,976
Materials				
7028 Audio Materials	0	0	0.00%	0
7029 Electronic Collections	108,525	8,645	7.97%	99,880
7041 Physical Collections	132,000	28,496	21.59%	103,504
7280 Material	22,000	5,449	24.77%	16,551
7283 Technology Supplies	19,500	5,638	28.91%	13,862
7284 ideaSHOP Supplies	500	0	0.00%	500
7398 Periodicals	0	96	0.00%	-96
Total Materials	282,525	48,324	17.10%	234,201
Other Expenses				
5120 Board&Committee /Non-payroll	4,000	0	0.00%	4,000
7320 Mileage	9,858	1,944	19.72%	7,914
7389 Culture Engagement	32,500	1,173	3.61%	31,327
7470 Programming - Children	14,260	3,312	23.23%	10,948



Corporation of the Town of Innisfil
Budget to Actual Variance Report - Operating
For the Period Ended March 2023
Library

	2023	Year to	YTD Actual as	Budget-Actual
	Total	Date	a Percent	Year to Date
	Budget	Actuals	of Budget	Remaining
7545 Project Expense	0	2,564	0.00%	-2,564
Total Other Expenses	60,618	8,993	14.84%	51,625
Public Relations				
7485 Public Relations	7,503	4,089	54.50%	3,414
Total Public Relations	7,503	4,089	54.50%	3,414
Purchased Services				
7380 Purchased Services	751	0	0.00%	751
Total Purchased Services	751			751
Software Maintenance and Licencing				
7580 Software Annual Maint. Fees	50,752	652	1.28%	50,100
Total Software Maintenance and Licencing	50,752	652	1.28%	50,100
Total Materials & Supplies	587,114	90,637	15.44%	496,477
Utilities				
Telephone and Utilities				
7600 Telephone	11,063	2,129	19.24%	8,934
7660 Utilities - Hydro	65,627	14,480	22.06%	51,147
7680 Utilities - Natural Gas	16,797	5,111	30.43%	11,686
7700 Utilities - Water/Sewer	6,798	1,397	20.55%	5,401
Total Telephone and Utilities	100,285	23,117	23.05%	77,168
Total Utilities	100,285	23,117	23.05%	77,168
Contracted Services				
Audit Fees				
8080 Audit	5,241	0	0.00%	5,241
Total Audit Fees	5,241	0	0.00%	5,241
Cleaning Contract				
8185 Cleaning Contract	39,720	7,143	17.98%	32,577
Total Cleaning Contract	39,720	7,143	17.98%	32,577
Contracts				
8250 Contracts - Labour	3,133	0	0.00%	3,133
8290 Contracts	10,888	0	0.00%	10,888
8325 Contracts - Grass Cutting	1,992	0	0.00%	1,992
8850 Snow Removal	36,091	16,689	46.24%	19,402
Total Contracts	52,104	16,689	32.03%	35,415
Total Contracted Services	97,065	23,832	24.55%	73,233
Rents & Financial				
Service Charges				
9110 Debit/Visa Charges	4,481	0	0.00%	4,481
Total Service Charges	4,481	0	0.00%	4,481
Total Rents & Financial	4,481	0	0.00%	4,481
Long term debt - Principal & Interest				
L.T.D. Principal & Interest				
5610 Debt Interest	46,104	24,036	52.13%	22,068
5620 Debt Principal	133,000	66,500	50.00%	66,500
Total L.T.D. Principal & Interest	179,104	90,536	50.55%	88,568



Corporation of the Town of Innisfil
Budget to Actual Variance Report - Operating
For the Period Ended March 2023
Library

	2023	Year to	YTD Actual as	Budget-Actual
	Total	Date	a Percent	Year to Date
	Budget	Actuals	of Budget	Remaining
Total Long term debt - Principal & Interest	179,104	90,536	50.55%	88,568
Internal Recoveries/Transfers				
Internal Rental Expenditure(Revenue)				
9600 Facility rental revenue(Intern	-29,000	0	0.00%	-29,000
9610 Facility rental expenditures(I	26,300	0	0.00%	26,300
Total Internal Rental Expenditure(Revenue)	-2,700	0	0.00%	-2,700
Internal Transfers				
9681 Snow Clearing - Expenditures	2,500	0	0.00%	2,500
Total Internal Transfers	2,500	0		2,500
Total Internal Recoveries/Transfers	-200	0	0.00%	-200
Total Expenditures	4,042,143	911,165	22.54%	3,130,978
Total Library Operating	3,741,817	800,310	21.39%	2,941,507
Total Library	3,741,817	800,310	21.39%	2,941,507
Total Library	3,741,817	800,310	21.39%	2,941,507



Corporation of the Town of Innisfil
Budget to Actual Variance Report - Capital
For the period Ended March 2023
Library

5d.01.02

	Carryover	2023	In-Year	Total	Actual	Expenditure	Service	
	from Prior	Budget	Approvals	Approved	Spent to	Still to	Bundle	
	Years	Approved	Granted	Budget	Date	Occur		
Library								
LIB4 RFID		50,000		50,000		50,000	Lead & Manage	
LIB5 Electronic Equipment - All Branches	34,948	80,915		115,863	1,976	113,887	Lead & Manage	
LIB37 Cookstown Facility Assessment & Repairs	112,298			112,298		112,298	Lead & Manage	
LIB39 Job Evaluation/Job Description/Pay Equity	7,185			7,185		7,185	Lead & Manage	
LIB42 Design / Preparation for ideaLAB & Library wit	550,000			550,000		550,000	Lead & Manage	
LIB44 Organizational Review	40,000			40,000	10,120	29,880	Lead & Manage	
LIB45 Updated Needs Assessment Study	40,000			40,000		40,000	Lead & Manage	
LIB52 Replacement Furnishings	19,458	30,000		49,458		49,458	Lead & Manage	
LIB65 Marketing Kiosks	99,993			99,993		99,993	Lead & Manage	
LIB66 Mobile Outreach Unit (InnMotion)	78,000			78,000		78,000	Lead & Manage	
LIB68 Movable Meeting Space		90,000		90,000		90,000	Lead & Manage	
LIB67 Space Planning		100,000		100,000	1,965	98,035	Lead & Manage	
Total Library	981,882	350,915		1,332,797	14,061	1,318,736		
Strategic Projects (Managed by Library)								
ADM25 Innisfil Engage: Community Engagement	4,229						Arts & Leisure	
Total Strategic Projects (Managed by Library)	4,229			4,229		4,229		
Total Library	986,111	350,915		1,337,026	14,061	1,322,965		

Municipal Council Report

March 8, 2023 Council Meeting

- [Watch the meeting.](#)
- Council received a presentation from Hemson & Associates re: Community Benefit Charges Strategy. [Watch the presentation.](#) Read the report: [DSR-036-23 Community Benefits Charge Strategy and Development Charges Background Study Project Update](#) (both are attached as Appendix 1 and 2)
(Note: On March 24, 2023 the Town published a proposed [Community Benefit Charge Strategy](#), attached as Appendix 3)
- Capital Planning Engineer, Carolina Cautillo delivered a presentation on the Facilities Master Plan process, focusing on the guiding principles for the upcoming study. Read the report: [DSR-031-23 Facilities Master Plan Guiding Principals](#)
- Council received a delegation from Peter Van Loan, Aird & Berlis LLP Re: Staff Report DSR-029-23 Official Plan Amendment and Zoning By-law Amendment Applications for 2241 and 2229 Innisfil Beach Road & 7352 Yonge Street. Mr. Van Loan advised that he represents the Royal Victoria Regional Health Centre (RVH) with respect to the proposed South Campus in the Town of Innisfil. He noted that their client is concerned with the potential negative impacts of the proposed development at the southwest corner of Innisfil Beach Road and Yonge Street and that they did not believe that it was in keeping with the original vision for this key gateway location.
- Council approved the creation of an election engagement committee of council. Read the report: [Municipal Elections Overview and Engagement Plan](#)
- The following members of the public were appointed to the Innisfil Heritage Advisory Committee: Deb Crawford, Debbie Savic, Cindy Maguire, Elaine Splett, Karen Mahoney, Lesley Sterling.
- Bill Pring and Paul Veloso were appointed to the audit committee.

March 15, 2023 Special Council Meeting

- Members of the public were invited to attend a special council meeting and to address Council regarding the [Orbit Potential and Innovation Plan \(OPIP\) Orbit Secondary Plan](#).

March 22, 2023 Council Meeting

- [Watch the meeting.](#)
- The Innisfil Beach Cruisers Car Club delivered a presentation and a donation of \$12,000 for an accessible park.
- Carolina Cautillo, Capital Planning Engineer Associate, Greg Kent and Peter Loughheed of EXP Consultants presented the final report of the Traffic Calming Strategy. [DSR-041-23 RDS363 Traffic Calming Strategy Final report](#) and [Presentation](#)
- Council nominated Mayor Dollin for the Ontario Small Urban Municipalities (OSUM) executive committee.
- Traffic Safety Advisory Committee [Terms of Reference](#) were updated.
- [Statement of Council Remuneration and Expenses for the Year Ended December 31, 2023](#) staff report was received.

Municipal Council Report

News from the Community

- ['Simcoe County...is changing': LGBTQ+ grad coach blazing a trail](#)
- [Innisfil Beach Cruisers Car Club donates \\$12,000 to support new accessible park in Innisfil](#)
- [Town of Innisfil celebrating holy month of Ramadan - Barrie News \(barrietoday.com\)](#)
- ['Learn more about Islamic culture and Ramadan': Innisfil hosting community dinner to mark holy month \(simcoe.com\)](#)
- ['A more holistic look': Town of Innisfil to return later this year with more flooding strategy open houses \(simcoe.com\)](#)
- ['Proven leadership': New chief sworn in at South Simcoe police - Barrie News \(barrietoday.com\)](#)
- [Innisfil council to review draft Orbit secondary plan, public invited to speak \(simcoe.com\)](#)
- ['People are in need everywhere': Fresh Food Weekly brings biweekly delivery program to Innisfil \(simcoe.com\)](#)
- [New economic development strategic plan underway in Innisfil - Barrie News \(barrietoday.com\)](#)
- [Podcast: We've Got Lots To Talk About This Week: Chili, Orbits, Newcomers, Reel Stories, Spring Forecasts, And More ... | Barrie 360 \(00:30 – 7:41\)](#)
- [Innisfil, Ont. holds public meeting to show off the Orbit development | CTV News](#)
- ['Without our health, we have nothing': Innisfil onion farmer makes \\$1M donation to hospital foundation \(simcoe.com\)](#)
- [Here's how much money Innisfil councillors were paid in 2022 \(simcoe.com\)](#)
- [Triton Music ensemble heading to Nationals, puts Innisfil on the map - Innisfil News \(innisfilday.ca\)](#)
- [Innisfil seeks feedback on future of local facilities - Barrie News \(barrietoday.com\)](#)

Town Council

2023 Community Benefits Charges (CBC)

Strategy Update



TOWN OF INNISFIL
Wednesday, March 8, 2023



Discussion Topics

- Introduction & Background
- Development Forecast
- Capital Program Summary
- CBC Revenue Estimate
- Next Steps

New Framework for “Growth-Related” Capital



Development Charges Act (DCs)

- Used to fund initial round of growth-related capital infrastructure
- Prescribed list of eligible services
- Certain “soft” services removed from list (e.g. parking, cemeteries, airports, affordable housing, studies)
- No more 10% discount for soft services



Planning Act: Community Benefits Charges (CBCs)

- Initial round of capital, can overlap with DCs
- In-kind contributions permitted
- Capped at 4% of land value
- Imposed only on development with 5 or more storeys & 10 or more housing units
- Only local municipalities can charge



Planning Act: Parkland Acquisition

- Parkland acquisition
- Standard rate of 5% for residential and 2% for non-residential
- Alternative, higher rate may apply based on units/ha – new rules which “cap” the amount conveyed or collected
- Cash In Lieu permitted

All tools are appealable to Ontario Land Tribunal (with conditions)

Planning Act: Community Benefits Charges (CBCs)

- Height/density “bonusing” under s.37 of Planning Act removed
- Replaced by CBC to fund growth-related capital
- In-kind contributions permitted
 - Credits for capital works are given



Legislative Basics

- Imposed by CBC by-law (no term limit)
- Only local or single-tier municipalities can charge
- Can only be levied against higher density development:
 - 5 or more storeys, AND
 - 10 or more residential units
- Requires a “strategy”
- Legislation does not prescribe CBC rate structure

Regulation sets cap at
4% of land value the day
before a building permit
is issued



Land value should
reflect zoning and
density permissions

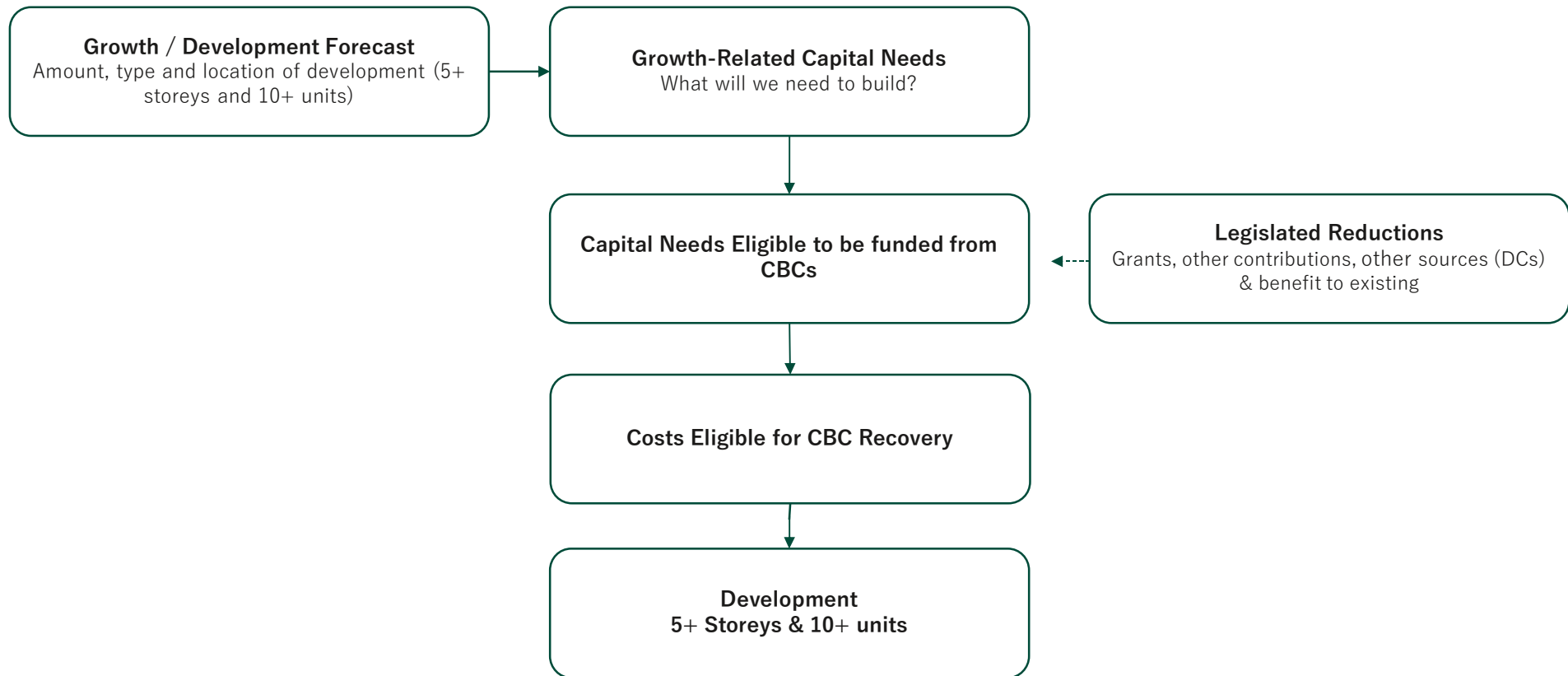
What Can CBCs Fund?

- Can recover any “growth related” capital cost
 - Eligible DC services (no overlap with DCs)
 - Parkland acquisition (no overlap with s.42)
 - Other services (DC ineligible services and others)
- Still requires “nexus tests” between servicing needs and development
 - Servicing needs arising from buildings with 5 or more storeys and 10 or more residential units

Service Categories Identified:

- Public Art
- Greenhouse
- Events Equipment
- Tree Canopy Expansion
- Lighting Improvements
- Affordable Housing
- Green Building Retrofits
- Traffic Calming Measures
- Bicycle Line Painting
- Studies
- Urban Parks
- Community Facilities
- Active Transportation
- Public Realm
- Protection Services
- Civic Administration

CBC Strategy Process



CBC Implementation and Administration

CBC By-law

Consultation is required but not defined

Adoption Process

Only one CBC By-law is allowed

Notice of passage (similar to DC By-law)

Right to appeal to Ontario Land Tribunal

Administration and
Reporting

Must establish CBC “special account”

In each calendar year, a municipality shall “spend or allocate” at least 60% of the monies

Maintain a list of (at least 3) appraisers under agreement with the municipality

Produce an “Annual Report” showing opening/closing balances of special account and all transactions

CBC Strategy Must...

- Forecast development and redevelopment of lands to which CBCs will be imposed
- Estimate increase in need for service arising from development and redevelopment
- Identify facilities, services and matters to be funded with CBCs
- Identify excess capacity, benefit to existing and other adjustments (similar to DCs)

Development Forecast: CBC Eligible Units

Year	# of CBC Units
2023	50
2024	717
2025	717
2026	717
2027	717
2028	717
2029	717
2030	717
2031	717
2032	717
Growth 2023- 2032	6,500

- Includes apartments 5 or more storeys with 10 or more residential units
- Forecast informed by Simcoe MCR and draft Orbit Secondary Plan estimates
- 10-year planning horizon 2023-2032
- Majority of CBC eligible units will occur within Orbit

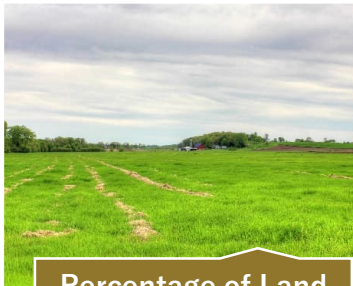
CBC Strategy Capital Program

- Need to include list of services and projects
- Project should include basic information:
 - Description
 - Timing
 - Gross costs and other funding sources (including DC and parkland revenue)
 - Potentially similar to DC Study capital program
- Prioritization of “projects” or “categories” does not need to be in the Strategy—many municipalities are developing standalone policies

Draft CBC Capital Program (\$Millions)

Project Description	Gross Project Cost	Grants / Subsidies / Other Recoveries	Net Cost	Benefit to Existing (%)	Benefit to Existing (\$)	Total Development Related Costs	CBC Share (%)	Total CBC Related Costs (\$)
1.0 Public Art	\$1.00	\$0.00	\$1.00	33%	\$0.33	\$0.67	58%	\$0.39
2.0 Greenhouse	\$1.52	\$0.00	\$1.52	33%	\$0.51	\$1.01	58%	\$0.59
3.0 Events Equipment	\$1.50	\$0.00	\$1.50	33%	\$0.50	\$1.00	58%	\$0.58
4.0 Tree Canopy Expansion	\$1.50	\$0.00	\$1.50	0%	\$0.00	\$1.50	58%	\$0.87
5.0 Lighting Improvements	\$1.00	\$0.00	\$1.00	0%	\$0.00	\$1.00	58%	\$0.58
6.0 Affordable Housing	\$9.60	\$0.00	\$9.60	0%	\$0.00	\$9.60	58%	\$5.55
7.0 Green Building Retrofits	\$1.00	\$0.00	\$1.00	33%	\$0.33	\$0.67	58%	\$0.39
8.0 Traffic Calming Measures	\$0.50	\$0.00	\$0.50	33%	\$0.17	\$0.33	58%	\$0.19
9.0 Bicycle Lines Painting	\$2.00	\$0.00	\$2.00	33%	\$0.67	\$1.33	58%	\$0.77
10.0 General Government - Studies	\$6.06	\$0.00	\$6.06	45%	\$2.72	\$3.33	58%	\$1.92
11.0 Urban Parks	\$5.67	\$0.00	\$5.67	0%	\$0.00	\$5.67	80%	\$4.54
12.0 Community Facilities	\$32.40	\$0.00	\$32.40	0%	\$0.00	\$32.40	80%	\$25.95
13.0 Active Transportation	\$5.40	\$0.00	\$5.40	0%	\$0.00	\$5.40	80%	\$4.33
14.0 Public Realm	\$5.40	\$0.00	\$5.40	0%	\$0.00	\$5.40	80%	\$4.33
15.0 Protection Services	\$7.56	\$0.00	\$7.56	0%	\$0.00	\$7.56	80%	\$6.06
16.0 Civic Administration	\$0.20	\$0.00	\$0.20	0%	\$0.00	\$0.20	100%	\$0.20
TOTAL	\$82.31	\$0.00	\$82.31		\$5.23	\$77.07		\$57.21

Potential CBC Rate Structures



Percentage of Land
Value



Per Unit



Per Gross Floor Area
(Square Foot)



Per Hectare/Acre of
Land

- Could differentiate charge by area, built form, “bands” of charges etc.
- Regardless, CBC cannot exceed 4% of land value *for each specific development*
- CBC land value adjusted for retention of existing buildings
- Legislation provides rules where there is disagreement on value of land

Proposed CBC Rate is Maximum Permissible 4% of Land Value

Year	
Unit Growth (2023-2032)	6,500
Population Growth in New Units (2023 – 2032)	11,700
Average Land Value per Unit ¹	\$25,000
Average CBC per Unit (4% Cap)	\$1,000
10-Year CBC Revenue Estimate²	\$6,500,000

¹ Average land values based on survey of sample municipalities

² Calculated by multiplying the 10-year growth by the average CBC per unit

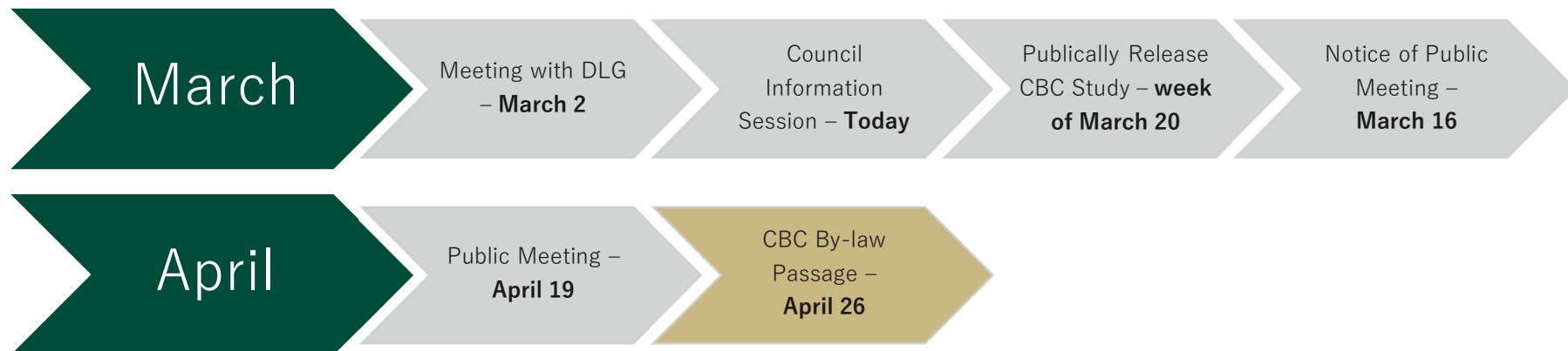
What are Other Municipalities Doing?

Municipality	Per Unit CBC Forecasted Revenue (Average at 4% of land value)	Unit Structure
Brampton	\$1,210	4% of land value
Guelph	\$986	4% of land value
Halton Hills ¹	\$3,300	4% of land value
Hamilton	\$906	4% of land value
Markham	\$3,825	4% of land value
Mississauga	\$2,268	4% of land value
Newmarket	\$1,147	4% of land value
Niagara Falls	\$1,600 - \$2,000	4% of land value
Pickering ²	\$1,580	\$1,070 / 2+ Bedroom Apt. \$657 / < 2 Bedroom Apt.
Richmond Hill	\$2,648	4% of land value
Toronto	\$5,704	4% of land value
Waterloo	\$1,372 (Central City) \$972 (Remainder of City)	4% of land value
Whitchurch-Stouffville	N/A	Per Unit (\$1,500) – not in force

¹Based on \$3.95M per hectare land cost and density of 100 units per hectare.

²Based on \$6.57M per hectare land cost and density of 79 units per hectare.

Proposed CBC Timeline





STAFF REPORT EXECUTIVE SUMMARY & RECOMMENDATION

The following executive summary provides a brief description about the report and the recommendation advises on any action being requested from Council.

**Subject: Community Benefits Charge Strategy and Development
Charges Background Study Project Update**

Executive Summary:

This report provides and update to Council on the Community Benefits Charges (CBC) Strategy and Development Charges (DC) Background Project, and to accompany the Hemson presentation on CBCs.

Recommendation:

That Staff Report DSR-036-23 regarding Community Benefits Charge Strategy and Development Charges Background Study Project Update dated March 8, 2023, be received for information.

Community Benefits Charge Strategy and Development Charges Background Study Project Update



Staff Report DSR-036-23

To: Mayor, Deputy Mayor, and Members of Council

From: Audrey Webb, Treasurer

Date: March 8, 2023

Recommendation:

That Staff Report DSR-036-23 regarding Community Benefits Charge Strategy and Development Charges Background Study Project Update dated March 8, 2023 be received for information.

Background:

In 2020, the Province of Ontario passed Bill 197, COVID-19 Economic Recovery Act, which replaced the density bonusing provisions in Section 37 of the Planning Act with a new growth-related funding tool for municipalities called Community Benefits Charge (CBC).

The previous Section 37 of the Planning Act enabled municipalities to negotiate the provision of facilities, services or other matters (i.e. Community Benefits) for developments that sought an increase in height and/or density beyond that permitted by the zoning by-law, commonly referred to as density bonusing.

The legislative changes allow local municipalities to impose a CBC in relation to development or redevelopment of higher density residential properties. If adopted, the Town will be able to utilize CBC revenues to help pay for capital costs associated with growth, and in particular, higher density residential buildings. The charge is capped at four percent (4%) of the appraised land value of a site as of the day prior to building permit issuance and is imposed on buildings with 5 or more storeys and 10 or more residential units. The CBC is an additional tool available to supplement the existing funding (i.e. development charges (DC) and parkland dedication) of growth-related costs. A CBC is applied via a by-law and is subject to appeal to the Ontario Land Tribunal (OLT), similar to the appeal process for DC By-laws.

The Town's existing Development Charges (DC) By-law will expire January 1, 2024, and therefore an update to the Development Charges Background Study (DCBS) and By-law is required by the end of 2023.

Hemson Consulting Ltd. was retained by the Town via RFP 21-103 to support the development of creating the Town's first CBC Strategy document and draft By-law. They were also retained to update the Town's existing Parkland Dedication By-law and the Development Charges Background Study and draft By-law.

The Town's Parkland Dedication By-law 097-22 was updated in 2022 and approved by Council on September 14, 2022.

Analysis/Consideration:**Community Benefit Charges**

A Community Benefits Charge Strategy document is required to support the adoption of a new CBC By-law. This strategy will incorporate growth estimates for higher density residential development (i.e. building with 5 or more storeys and 10 or more residential units) and the proposed capital program to accommodate this growth.

Staff are working with Hemson in the development of a draft CBC Strategy and By-law. Consultation with the development industry has been included in the project plan, which includes a March 3, 2023, meeting with the Developer's Liaison Group (DLG). Although there are no requirements via legislation to hold a statutory public meeting or provide an advanced release of the CBC Strategy prior to Council approval, Town staff are following a similar public consultation process used for the DC Background Study and associated By-law approval, with a public meeting scheduled for April 19, 2023.

Hemson will be making a presentation to Council March 8, 2022. This presentation will provide Council with an overview of the CBC legislation, Innisfil's draft CBC capital program, potential revenues and a recommended rate structure.

Development Charges Background Study (DCBS)

The DCBS and By-law will be prepared in coordination with the CBC Strategy and By-law. There are many synergies to be gained in preparing these two studies together, as growth related costs not eligible to be recovered from DCs, can be included in the CBC capital program to the extent that the growth costs can be attributed to the servicing needs arising from buildings with 5 or more storeys and 10 or more residential units.

The More Homes Built Faster Act which received Royal Assent on November 28, 2022 introduces significant changes to development charges through various exemptions, phasing in requirements for the DC by-law, and the removal of studies from the DC capital program. The updated DCBS and By-law will incorporate these changes.

Town staff and Hemson have begun work on this project and are targeting to have a new DCBS and By-law to Council by the end of September 2023, with an effective date of January 1, 2024.

Community Strategic Plan Alignment:

Ensuring financial sustainability includes operating within a framework of policies and processes intended to improve fiscal outcomes and support longer-term financial health. A CBC Strategy and By-law, and DCBS & By-Law will ensure the Town maximizes opportunities for growth related revenues used to pay for growth costs.

Financial Consideration:

Capital project ADM20-DCBS and CBC Strategy was approved as part of the 2021 Budget and awarded to Hemson Consulting Ltd. There are no additional costs for this project.

The recovery of capital-related costs from future development is a crucial financial tool provided by the Province to assist in recovering the cost of infrastructure required to support new growth in the Town. Bill 23 will result in decreased municipal revenues collected through development

charges that can be used to pay for growth-related infrastructure. Through this project, Staff will work with Hemson to optimize revenue opportunities within the framework of the new legislation.

Local Impact:

With a decrease in development charge revenues as a result of Bill 23, impacts may be felt through increased property tax rates. Staff however will explore all opportunities to mitigate these impacts through alternative revenue sources.

Options/Alternatives:

Town can choose not to proceed with the development of a Community Benefit Charge Strategy or update to the Development Charges Background Study, however this is not recommended, as the costs to provide this growth-related infrastructure would need to be funded from other revenue sources, such as property taxes.

Conclusion:

Staff have started work to update the DCBS and the new CBC Strategy. A timeline of the project is noted below.

CBC Strategy Timelines

Item	Date
Develop growth forecast & capital program	Early/Mid - February
Meeting with DLG	March 2nd
Council Information Session	March 8th
Release CBC Study to Public	Week of March 20th
Public Meeting	April 19 th
By-law Passage	April 26 th

DCBS Timelines

Item	Date
Develop growth forecast & Historical Service Levels	February
Prepare DC Capital Program	February/March
Stakeholder consultation with DLG	Week of April 3rd
Council Information Session	May 10 th
Stakeholder consultation with DLG	Week of June 5 th
Public Meeting	August 16 th
By-law Passage	September 27 th

Prepared By:

Audrey Webb, Treasurer

Approved By:

Mike Melinyshyn, CFO/Director of Corporate Service and Innovation

Attachments:

None

Reference Material:

[Community Strategic Plan](#)

[DC By-law 104-18](#)

[DC Amending By-law 099-21](#)

[Development Charge Background Study - 2018](#)

[Development Charges Amendment Background Study - 2021](#)

Report for Public Consultation

Prepared by Hemson for the Town of Innisfil

Town of Innisfil Community Benefits Charge Strategy

March 24, 2023



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List of Acronyms

Act Planning Act (Ontario), R.S.O. 1990, c. P.13

BTE Benefit to Existing

CBC Community Benefits Charge

DC Development Charges

DCA Development Charges Act, 1997

GFA Gross Floor Area

GFT Growth Funding Tool

PPU Persons per Unit

Executive Summary

A. Purpose of 2023 CBC Strategy

i. What is a Community Benefits Charge?

A Community Benefits Charge (CBC) is a new funding tool authorized under the *Ontario Planning Act, 1990* (the Act) that allows municipalities to impose a charge against higher density development to pay for development-related capital costs. The CBC provisions replace former section 37 height and density bonusing provisions in the Act, subject to transition rules.

Municipalities can use CBCs to pay for “facilities, services, and other matters attributable to the anticipated development and redevelopment to which the community benefits charge by-law would relate.” As such, they can be used together with development charges (DCs) and parkland and other public recreation amenities contributions by developers under section 42 of the Act. Provided they are used to fund development-related costs that are not also funded by DCs and section 42 contributions, the scope of CBCs is quite broad.

ii. Legislative Context

This Town of Innisfil 2023 Community Benefits Charge Strategy (CBC Strategy) is presented as part of the process to lead to the approval of a CBC By-law in compliance with the Act. The Strategy is prepared in accordance with the Act and associated Ontario Regulations 509/20 (O.Reg. 509/20), including the amendments that came into force on September 18, 2020.

iii. CBCs Levied on Higher Density Development

A CBC can only be levied against mid- to high-density development, limited by the Act to buildings that are:

- five or more storeys, **and**
- contain 10 or more residential units.

Note that a mixed use development, a building that contains both residential and non-residential uses, can be subject to a CBC if it meets the above criteria.

Ontario Regulation 509/20 provides for a number of exemptions from the payment of a CBC, namely:

- long-term care & retirement homes;
- colleges, universities and post-secondary indigenous institutes;
- Royal Canadian Legion buildings or structures;
- hospices for end of life care; and
- non-profit housing.

B. CBC Strategy

Subsection 37(32) of the Act prescribes that the maximum permitted CBC that can be levied against any particular development is 4 per cent (4%) of land value on the day before issuance of the building permit. Several key steps must be undertaken in order to levy CBCs. They include preparing a CBC Strategy prior to passing a CBC by-law. Through the Strategy, the Town must:

- prepare a development (growth) forecast;
- determine the increased infrastructure need arising from development;
- estimate the capital costs of providing the necessary infrastructure;
- determine the share of these costs attributed to CBC development, by identifying and deducting:
 - excess capacity;
 - benefit to existing development; and
 - grants, subsidies or other contributions.

C. Development Forecast

Over the 10-year planning period from 2023-2032, Innisfil is anticipated to grow by about 5,700 occupied dwellings in buildings that would be subject to a CBC. As set out in Section 3 of O.Reg. 509/20 the maximum permissible CBC is capped at 4 per cent (4%) of the land value of development sites.

D. CBC Capital Needs Exceed Revenue Forecast

The estimated CBC eligible costs of the development-related capital program total \$40.93 million (see Section 4) over the 10-year period 2023-2032. A high-level estimate of CBC revenues, over the same 10-year period, is \$5.70 million, based on the 4 per cent (4%) legislated cap. As such, the CBC eligible costs exceed the anticipated 10-year revenue potential by a significant margin, supporting the application of a CBC charge that is based on the 4 per cent (4%) cap or some other rate variation.

E. Application of CBCs

Hemson is currently working with staff on developing a CBC rate structure. This includes consideration of a per cent of land value or a charge per unit. As per the legislation, the value of the land to which the charge applies is determined as the value on the day before the issuance of a building permit, or the first building permit if the development requires multiple permits. It is proposed that the charges will apply on all eligible development, excluding those made exempt from CBCs under subsection 37 (4) (e) of the Act and section 1 of O. Reg. 509/20.

If the Town does not proceed with a charge based on a per cent of land value, and instead implements a charge per unit, it is recommended that the determination of the charge be based on land values, with consideration for variations in land values by geography and density, and be adjusted annually and reviewed at a minimum every five years. The Town will also reserve the right to undertake site specific appraisals if there is a reason to believe the charge per unit assumption may be understated.

1. Introduction & Background

This Town of Innisfil Community Benefits Charge (CBC) Strategy is presented as part of a process to lead to the approval of a new community benefits charge by-law in compliance with the *Planning Act, 1990* (the Act).

CBCs are a relatively new revenue source for municipalities. Generally, the framework for CBCs is as follows:

- CBCs can only be used to fund growth-related shares of capital infrastructure – there are no restrictions on which services can be funded through CBCs;
- Projects identified for CBC funding can overlap with other revenue sources such as development charges and parkland dedication, but cannot be “doubled counted” for recovery through revenue sources;
- In-kind contributions are permitted and municipalities may require an agreement with a land owner be registered on title;
- CBCs are “capped” at 4% of the land value;
- CBCs can only be imposed on developments with 5 or more storeys and 10 or more residential units; and
- Only single-tier and lower-tier municipalities can charge CBCs on development.

A. CBC Strategy Requirements

Subsection 37(9) of the Act and section 2 of O. Reg. 509/20 require that a community benefits charge strategy shall:

- (a) include estimates of the anticipated amount, type and location of development and redevelopment with respect to which community benefits charges will be imposed;
- (b) include estimates of the increase in the need for facilities, services and matters attributable to the anticipated development and redevelopment to which the community benefits charge by-law would relate;
- (c) identify the excess capacity that exists in relation to the facilities, services and matters referred to in clause (b);
- (d) include estimates of the extent to which an increase in a facility, service or matter referred to in clause (b) would benefit existing development;
- (e) include estimates of the capital costs necessary to provide the facilities, services and matters referred to in clause (b); and
- (f) identify any capital grants, subsidies and other contributions made to the municipality or that the council of the municipality anticipates will be made in respect of the capital costs referred to in clause (e).

This Strategy presents the estimated CBC development-related net capital costs attributable to CBC eligible development that is forecast to occur in the Town. The apportionment of the net capital costs among various development-related funding sources, including development charges, parkland dedication and others, is also provided.

B. Legislative Context

Community benefits charges has replaced what was previously referred to as section 37 “Increased Density” or “Density Bonusing” in the Act. The change was finalized through the *COVID-19 Economic Recovery Act, 2020*, which built on the *More Homes, More Choice Act, 2019* and *Plan to Build*

Ontario Together Act, 2019. Most recently, the government of Ontario passed Bill 23, the *More Homes Built Faster Act, 2022* which proposed significant changes to the land use approval system with the goal of constructing 1.5 million new homes by 2031.

The new section 37 authorizes municipalities to impose CBCs against land to pay for the capital costs of facilities, services and matters required because of development or redevelopment in the municipality. Not yet in force are reductions for developments containing affordable and attainable residential units which we introduced through Bill 23, the *More Homes Built Faster Act, 2022*.

The new section 37 sets out the relationship between CBCs and other development-related funding tools, including development charges levied under the *Development Charges Act, 1997*. Capital costs identified for funding from development charges or parkland dedication cannot be funded from CBCs.

The legislation also sets out requirements for the adoption of a CBC By-law, including:

- Consultation with the public is required but not defined;
- Only one CBC By-law is allowed to be enforce at a time;
- Notice of the CBC By-law passing must be given (similar to a development charges by-law);
- The By-law is appealable to the Ontario Land Tribunal.

Moreover, various administration and reporting requirements must be implemented:

- A municipality with a CBC By-law must establish a “special account”;
- In each calendar year a municipality must “spend or allocate” at least 60% of the monies;

- A municipality with a CBC By-law must maintain a list of at least three appraisers; and
- An “annual report” must be produced showing the opening/closing of a special account and all transactions.

Finally, a CBC Strategy must be reviewed every 5-years to determine if the by-law needs to be updated.

C. Consultation of Proposed CBCs in Innisfil

The Act requires that municipalities consult with the public when implementing a CBC by-law. Accordingly, the Town will make this CBC Strategy and a draft CBC By-law available for public comment prior to Council’s consideration and passage of the By-law. A public meeting of Council is proposed to be held on April 19, 2023 following the public release of the CBC Strategy.

Consultation with development industry representatives was undertaken in March 2023. Following completion of this consultation process, it is proposed that Council review the Strategy and the comments received during the consultation process, before adopting the new CBC By-law in April 2023.

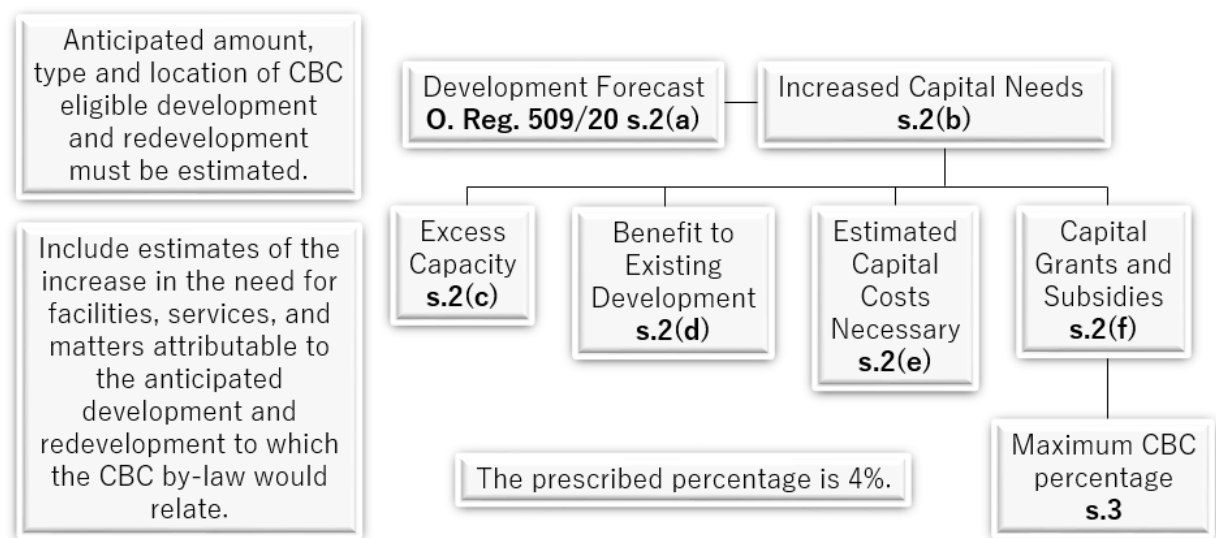
2. Purpose of the 2022 Community Benefits Charge Strategy

This section describes the methodology for determining the CBC rate for the Town and provides details on the capital works and service categories used to establish CBC eligible costs.

A. Key Steps in Determining CBCs

As shown in Figure 1, the Act requires that the CBC Strategy include various components in order to validate the resulting charge.

Figure 1 Key Steps in Determining CBCs



B. Proposed Methodology and Approach

The *Planning Act* does not specify the method by which a CBC is levied. In developing a CBC, a municipality can consider charges based on a percentage of land value, a per-unit charge, or a charge based on gross floor area. Most municipalities with CBCs have adopted the first option, based on

a charge calculated as four per cent (4%) of land value at the time of first building permit issuance.

It is proposed that the charge be levied on the basis of a percentage of land value or as a charge per unit, with no individual CBC exceeding the legislated maximum of four per cent (4%) of land value. Either approach will adjust for variability in land values across geographies and building typologies.

The CBC capital program, summarized in the section below and in Section 4, was developed with Town staff and relies on previous work completed for the Town's capital budget and forecast, the 2018/2021 DC Background Studies and ongoing 2023 DC Background Study, various master servicing plans, the Town Official Plan and other planning documents.

As required by the legislation, all CBC revenues will be paid into a single reserve fund (or special account). In each calendar year, the Town must allocate or spend at least 60 per cent of the monies in the special account at the beginning of the year. A separate policy, outside the framework of this Strategy, will be developed to prioritize CBC project allocation and spending.

The CBC Strategy serves to substantiate levying a four per cent (4 %) CBC and to satisfy the legislative and regulatory requirements, and is a point in time analysis of eligible capital programs and projects to which the Town may allocate CBC monies. From a legislative perspective, the CBC Strategy does not represent any expression of Council policy, prioritization, or other formal expression of intent to fund or allocate any funds specific services, facilities, or projects set out in the CBC capital program.

C. CBC Capital Program Summary

The gross cost of the CBC capital program of projects eligible for partial or full funding from CBCs is \$51.71 million. Approximately \$10.78 million of this gross capital cost is ineligible for CBC funding, having been removed from consideration as excess capacity, costs that benefit existing residents of the Town (BTE shares), or costs to be funded from other growth funding tools such as development charges or other revenue sources (e.g. property tax or alternative revenue source).

No grants or subsidies have been identified to cover the gross cost of the program. Replacement or benefit to existing shares removed from the eligible recovery costs total \$5.23 million. Of the remaining \$46.48 million:

- \$40.93 million is considered to benefit development in buildings of five or more storeys and containing 10 or more residential units, and as such, is eligible for CBC funding;
- Currently there is no identified overlap with DC funding under the Town's current by-law, the Strategy capital program and allocations will be reviewed as part of the Town's 2023 DC Background Study update and adjusted as necessary; and
- \$5.55 million will be funded from other revenue sources.

The capital program is based on service levels planned for and provided by the Town. These service levels are not exclusively tied to a particular time horizon. The capital facilities set out herein are a snapshot of what the Town currently needs to fund to maintain those service levels during the 10-year planning period of 2023-2032. As projects are completed, the Town will continue with additional capital projects to provide the same or similar service levels, and therefore the capital facilities listed will continue to evolve. The CBC capital program is summarized in Table 1 below.

TABLE 1

**TOWN OF INNISFIL
SUMMARY OF CBC CAPITAL PROGRAM (\$000)**

Service	Gross Cost	Grants, Subsidies & Other Recoveries	Net Cost	Benefit to Existing	Total Development Related Cost	Development Charge Funding	Other Funding Sources	Total CBC Eligible Costs
1.0 Public Art	\$ 1,000	\$ -	\$ 1,000	\$ 333	\$ 667	\$ -	\$ 303	\$ 364
2.0 Greenhouse	\$ 1,520	\$ -	\$ 1,520	\$ 507	\$ 1,013	\$ -	\$ 461	\$ 553
3.0 Events Equipment	\$ 1,500	\$ -	\$ 1,500	\$ 500	\$ 1,000	\$ -	\$ 454	\$ 546
4.0 Tree Canopy Expansion	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ 1,500	\$ -	\$ 682	\$ 818
5.0 Lighting Improvements	\$ 1,000	\$ -	\$ 1,000	\$ -	\$ 1,000	\$ -	\$ 454	\$ 546
6.0 Affordable Housing	\$ 9,600	\$ -	\$ 9,600	\$ -	\$ 9,600	\$ -	\$ -	\$ 9,600
7.0 Green Building Retrofits	\$ 1,000	\$ -	\$ 1,000	\$ 333	\$ 667	\$ -	\$ 303	\$ 364
8.0 Traffic Calming Measures	\$ 500	\$ -	\$ 500	\$ 167	\$ 333	\$ -	\$ 193	\$ 141
9.0 Bicycle Lines Painting	\$ 2,000	\$ -	\$ 2,000	\$ 667	\$ 1,333	\$ -	\$ 771	\$ 562
10.0 General Government - Studies	\$ 6,055	\$ -	\$ 6,055	\$ 2,725	\$ 3,330	\$ -	\$ 1,926	\$ 1,404
11.0 Urban Parks	\$ 1,638	\$ -	\$ 1,638	\$ -	\$ 1,638	\$ -	\$ -	\$ 1,638
12.0 Community Facilities	\$ 9,360	\$ -	\$ 9,360	\$ -	\$ 9,360	\$ -	\$ -	\$ 9,360
13.0 Active Transportation	\$ 4,680	\$ -	\$ 4,680	\$ -	\$ 4,680	\$ -	\$ -	\$ 4,680
14.0 Public Realm	\$ 4,680	\$ -	\$ 4,680	\$ -	\$ 4,680	\$ -	\$ -	\$ 4,680
15.0 Protection Services	\$ 4,680	\$ -	\$ 4,680	\$ -	\$ 4,680	\$ -	\$ -	\$ 4,680
16.0 Civic Administration	\$ 1,000	\$ -	\$ 1,000	\$ -	\$ 1,000	\$ -	\$ -	\$ 1,000
Total	\$51,713	\$0	\$51,713	\$5,231	\$46,482	\$0	\$5,547	\$40,934

D. Area-Specific Rate Considerations

Consideration was given as to whether or not CBCs should be implemented on a Town-wide or area-specific basis. Unlike DC by-laws, the *Planning Act* states that municipalities may only impose one CBC by-law.

Although, there is nothing in the Act that prohibits the Town from imposing area-specific CBCs within a single by-law, the legislation appears to promote a municipal-wide approach as the land value cap results in a form of area rating; land values typically vary across a municipality so the applicable CBC will reflect area differences.

If the Town considers a CBC rate structure other than a per cent of land value approach, such as a charge per unit, it is recommended the Town consider variable rates reflecting geographic and density locations, as well as other factors that affect land values.

E. Relationship to Other Growth Funding Tools and Ongoing Studies

Hemson is currently preparing the Town's 2023 DC Background Study and related By-law as well as a review of the Parkland Dedication/Cash-in-Lieu By-law, which is anticipated to be completed in Fall 2023.

This CBC Strategy is being completed in advance of the other studies recognizing that applications for CBC eligible high-density developments are imminent. The projects identified in this Strategy account for any known contributions from other growth funding tools such as development charges and parkland dedication revenues. Following the completion of the 2023 DC Background Study and Parkland Dedication/Cash-in-Lieu analysis, this CBC Strategy will be reviewed and capital project allocations may be redone to reflect anticipated funding from other revenue sources.

F. Implementation and Administration

The implementation and administration of the CBC will be determined by the CBC By-law, prevailing legislation and the CBC policies and practices to be established by Council.

3. Development Forecast

This section describes the methodology and results of the development forecast that forms the basis of the capital program. This section portrays the results of the housing unit and population forecast in line with the requirements of O. Reg. 509/20 s.2(a).

A. Proposed 10-Year Planning Horizon

The Town establishes capital budgets on a 10-year basis and the CBC Strategy capital programs are in line with the internal Town capital planning time-frame. In addition, the time frame aligns with the ongoing 2023 DC Background Study as some capital projects are eligible to be funded using both growth funding tools.

The time frame for the development forecast and the capital programs in this CBC Strategy is 2023 – 2032.

B. Development Forecast Assumptions

The development forecast is based on estimates of growth occurring within approved Official Plan designated urban areas and recent minister's zoning order (MZO) for the Orbit lands. The forecast has been informed by the County of Simcoe 2022 Municipal Comprehensive Review (MCR), the draft 2023 Orbit Secondary Plan and related phasing strategy as well as discussions with Town staff.

It is assumed that approximately 90% of apartment units over the next 10-years will be constructed within the boundary of the Orbit lands and all of these units will meet the CBC criteria and be five or more storeys *and* contain 10 or more residential units. The remaining 10% of units will be constructed elsewhere in the Town. As shown in Table 2, the total forecast of units subject to CBCs is 5,700 apartment unit starts over the 2023-2032 period.

Table 2: Forecast of Town-wide Units Subject to CBCs

Year	Total
Total 2023-2032	5,700

Table 3 shows the calculation of persons in units subject to CBCs as a percentage of persons in all units. This calculation uses the occupancy factors or “persons per unit” (PPU). The average apartment unit PPU is 1.80 for blended apartments; this, when applied by the total 10-year CBC unit start forecast (5,700), results in an estimate of 10,260 persons in units subject to a CBC. This represents 55 per cent of the overall 10-year forecast of people in all unit starts (18,807) which has been informed by the 2022 Simcoe County MCR allocations for the Town.¹

This 55 per cent figure is used to inform the CBC-eligible percentage of projects that are anticipated to benefit all residential and mixed-use development, as shown in Section 4. It is noted that, for certain projects a non-residential benefit is recognized resulting in a CBC-eligible share of 42 per cent.

The 10-year non-residential forecast informed by the Simcoe County MCR allocations is used to determine shares of capital costs related to growth in CBC-eligible development where a project benefits both residential and non-residential development. The 10-year forecasted population in new dwelling units plus place of work employment totals 24,337; of this total growth, 77 per cent (18,807) is anticipated to occur within residential development while the remaining 23 per cent (5,530) is related to non-residential development. The CBC eligible share of projects which have a residential and non-residential benefit is 42 per cent.

¹ The 2023 DC Background Study is currently underway and assumptions have not yet been finalized. The growth forecast assumptions used for the purposes of the CBC Strategy are based on best available information and may not align with the final assumptions used for the purposes of the 2023 DC Background Study.

Table 3. Town-wide Forecast of Persons in Unit Starts, 2023 – 2032

Residential	Single/Semi	Row	Apartment	Total
Units Subject to CBC	0	0	5,700	5,700
All Units	1,559	1,264	5,700	8,523
PPU Assumptions	3.22	2.79	1.80	
Persons in Units Subject to CBCs	0	0	10,260	10,260
Persons in All Units	5,020	3,527	10,260	18,807
% of Persons in Units Subject to CBCs (Residential Only)				55%
Non-Residential				Total
Employment Growth				5,530
Residential & Non-Residential Allocation				
Total Gross Population & Employment Growth				24,337
% of Persons in Units Subject to CBCs (Residential/Non-Residential)				42%

4. CBC Capital Program

A. Facilities, Services, and Matters Considered

Before passing a CBC by-law, the Act requires municipalities to prepare a CBC Strategy that identifies the facilities, services and matters that will be funded with community benefits charges. The Act does not prescribe the specific facilities, services or matters to which CBC funding may be allocated.

Section 5 outlines the CBC revenue analysis and rate structure. Detailed in this section is evidence that the anticipated CBC revenue permitted for collection under the four per cent (4 %) cap, is insufficient to meet the increased needs arising from the CBC-eligible development. Through consultation with Town staff, a priority list of service categories have been identified. The list is based on projects that have lost eligibility for DC funding, projects anticipated to provide service for new high-density developments not currently identified in the Town's 10-year capital plan, projects where DC legislation limits funding due to historical service level restrictions and others. The following services have been included as related to developments subject to the CBC:

- Public Art;
- Greenhouse;
- Events Equipment;
- Tree Canopy Expansion;
- Lighting Improvements;
- Affordable Housing;
- Green Building Retrofits;
- Traffic Calming Measures;
- Bicycle Lines Painting;
- General Government – Studies;
- Urban Parks;

- Community Facilities;
- Active Transportation;
- Public Realm;
- Protection Services;
- Civic Administration.

Under each of these services, the Town anticipates development-related costs which are, fully or partially, driven by mid and high-density residential and mixed-use development. The identified CBC-eligible project costs for these services are beyond the costs anticipated to be funded through other growth funding tools (GFT) - including development charges and parkland dedication.

The CBC capital program is a point-in-time analysis of the needs anticipated over the 2023 – 2032 planning period. It is recognized that these needs may change over time through the Town’s normal annual budgeting processes. While certain projects are listed within the CBC capital program, the identified capital project listings do not preclude the Town from assigning CBC funds to another facility or project under that service.

Each service area covers the following matters:

- Service Description;
- Service Delivery and Service Levels Consideration;
- Estimate of Need;
- Consideration of Excess Capacity;
- Capital Cost;
- Identification of any Anticipated Capital Grants, Subsidies or Other Contributions;
- Consideration of Benefit to Existing;
- Relation to funding from Other Growth Funding Tools (GFT) (if applicable) and Other Funding;
- Share of Net Capital Costs related to CBC Eligible Developments.

B. Projects Funded by Multiple GFTs

When a project is identified for funding from both DCs and CBCs, it recognizes the CBC development (higher density residential) places an incrementally higher demand for the service/project than is permitted under the 15-year service level restrictive funding envelope cap required for development charges. There is no funding of the same share of project from both DC and CBCs.

C. Capital Needs by Service

Table 4 below includes the details by service of the capital needs associated with the forecasted CBC eligible developments in the Town over the 10-year period 2023-2032. The capital costs included in this Strategy reflect a point in time for this framework, however, the need for the services is estimated to continue beyond the 10-year period relative to the amount of CBC development.

Although no formal policy on the application of funds has yet to be developed outside of the statutory requirements, the Town may choose to prioritize projects with no other growth funding tool sources for CBC funds. This will continue to be monitored and evaluated on an ongoing basis.

TABLE 4
TOWN OF INNISFIL
SUMMARY OF CBC CAPITAL PROGRAM

Project Categories	Gross Project Cost	Grants / Subsidies / Other Recoveries	Net Cost	BTE (%)	Replacement & BTE Shares (\$)	Total Development Related Costs (A)	DC Funded Share (B)	Remaining Development-Related (C) = A - B	Other Funding (D) = A - B - E	CBC Share (%)	Total CBC Related Costs (E)
1.0 Public Art	\$1,000,000	\$0	\$1,000,000	33%	\$333,333	\$666,667	\$0	\$666,667	\$302,972	55%	\$363,694
2.0 Greenhouse	\$1,520,000	\$0	\$1,520,000	33%	\$506,667	\$1,013,333	\$0	\$1,013,333	\$460,518	55%	\$552,815
3.0 Events Equipment	\$1,500,000	\$0	\$1,500,000	33%	\$500,000	\$1,000,000	\$0	\$1,000,000	\$454,458	55%	\$545,542
4.0 Tree Canopy Expansion	\$1,500,000	\$0	\$1,500,000	0%	\$0	\$1,500,000	\$0	\$1,500,000	\$681,688	55%	\$818,312
5.0 Lighting Improvements	\$1,000,000	\$0	\$1,000,000	0%	\$0	\$1,000,000	\$0	\$1,000,000	\$454,458	55%	\$545,542
6.0 Affordable Housing	\$9,600,000	\$0	\$9,600,000	0%	\$0	\$9,600,000	\$0	\$9,600,000	\$0	100%	\$9,600,000
7.0 Green Building Retrofits	\$1,000,000	\$0	\$1,000,000	33%	\$333,333	\$666,667	\$0	\$666,667	\$302,972	55%	\$363,694
8.0 Traffic Calming Measures	\$500,000	\$0	\$500,000	33%	\$166,667	\$333,333	\$0	\$333,333	\$192,807	42%	\$140,527
9.0 Bicycle Lines Painting	\$2,000,000	\$0	\$2,000,000	33%	\$666,667	\$1,333,333	\$0	\$1,333,333	\$771,226	42%	\$562,107
10.0 General Government - Studies	\$6,055,000	\$0	\$6,055,000	45%	\$2,724,750	\$3,330,250	\$0	\$3,330,250	\$1,926,282	42%	\$1,403,968
11.0 Urban Parks	\$1,638,000	\$0	\$1,638,000	0%	\$0	\$1,638,000	\$0	\$1,638,000	\$0	100%	\$1,638,000
12.0 Community Facilities	\$9,360,000	\$0	\$9,360,000	0%	\$0	\$9,360,000	\$0	\$9,360,000	\$0	100%	\$9,360,000
13.0 Active Transportation	\$4,680,000	\$0	\$4,680,000	0%	\$0	\$4,680,000	\$0	\$4,680,000	\$0	100%	\$4,680,000
14.0 Public Realm	\$4,680,000	\$0	\$4,680,000	0%	\$0	\$4,680,000	\$0	\$4,680,000	\$0	100%	\$4,680,000
15.0 Protection Services	\$4,680,000	\$0	\$4,680,000	0%	\$0	\$4,680,000	\$0	\$4,680,000	\$0	100%	\$4,680,000
16.0 Civic Administration	\$1,000,000	\$0	\$1,000,000	0%	\$0	\$1,000,000	\$0	\$1,000,000	\$0	100%	\$1,000,000
TOTAL	\$51,713,000	\$0	\$51,713,000		\$5,231,417	\$46,481,583	\$0	\$46,481,583	\$5,547,382		\$40,934,201

D. Public Art

i. Service Description

This service area includes items such as enhanced urban design and public art. Public art can take many forms and is a way to express community values and brings a shared experience into the Town of Innisfil. The capital costs included are those which are ineligible for funding through development charges and is not abutting development which are part of the local service.

Recognizing the higher level of pedestrian and other active transportation activity in the Town – especially in higher density areas, Public Art investment is important to ensure functional and liveable communities.

ii. Service Delivery and Service Levels Consideration

The Town has a dedicated public space installations and care fund for the purposes of investing in public art.

iii. Estimate of Need

The need included in the CBC Strategy for recovery from CBC eligible developments is based on discussions with staff and the Public Art Policy.

iv. Consideration of Excess Capacity

There is no excess capacity in the Public Art CBC capital program.

v. Capital Cost

The total gross cost of \$1.00 million of the program includes a provision for public art installation funding at \$100,000 annually.

vi. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

No grants, subsidies or other contributions have been identified for the projects included in the capital program.

vii. Consideration of Benefit to Existing

A benefit to existing share of one-third, or \$333,333, has been assigned to the Public Art CBC capital program provision to recognize benefit to existing residents of the public art installations identified in the CBC Strategy.

viii. Relation to Funding from GFT (if applicable) and Other Funding

None of the identified projects have funding from other growth funding tools. A share of \$302,972 has been removed from the eligible costs and is related to development in the Town that does not fall within the CBC eligible development threshold and therefore will not be funded from CBCs.

ix. Share of Net Capital Costs Related to CBC Eligible Developments

The provision for public art has been allocated 55 per cent (\$363,694) to CBC eligible developments.

E. Greenhouse

i. Service Description

The Town of Innisfil will construct a new 10,000 square foot greenhouse within the 2023 – 2032 planning period. Costs are related to constructing the new facility and acquiring tools, materials and staff time.

ii. Service Delivery and Service Levels Consideration

The greenhouse is a new project. In the absence of other revenue sources such as CBCs, funding for the greenhouse would be done through the through the Alternative Revenue Source(ARS) reserve fund and/or Town's tax base funded reserve and reserve funds.

iii. Estimate of Need

The construction of a new greenhouse is proposed in the Town's Civic Campus which is a master planned health and recreation hub to support the growing needs of residents in the community.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$1.52 million over the 10-year planning period.

vi. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

No grants, subsidies, or other recoveries have been identified for the new greenhouse facility.

vii. Consideration of Benefit to Existing

One-third or \$506,667 has been identified as non-growth related share deemed to benefit existing residents.

viii. Relation to Funding from GFT (if applicable) and Other Funding

No other development charges or other growth-funding tools have been identified for this service. In total, \$460,518 has been identified through other funding sources.

ix. Share of Net Capital Costs Related to CBC Eligible Developments

In total, \$552,815 of the greenhouse (55 per cent) is included in the CBC-related cost and is eligible for recovery from CBC developments.

F. Events Equipment

i. Service Description

Events equipment includes capital costs related to annual investment in equipment for places such as campus soccer fields, portable stages, sound equipment, etc. It also includes marketing materials and staffing costs.

ii. Service Delivery and Service Levels Consideration

The acquisition of events equipment would be funded from the Town's tax base.

iii. Estimate of Need

The acquisition of events equipment is necessary as the Town continues to grow. As new residents are added, the Town will continue to provide programming and events that service the needs of residents.

iv. Consideration of Excess Capacity

There is no excess capacity available within the Town's events equipment and the costs included in the CBC strategy are related to incremental needs arising from residential development.

v. Capital Cost

The gross capital cost associated with the events equipment program is \$1.50 million.

vi. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

No grants, subsidies or other contributions have been identified for this service.

vii. Consideration of Benefit to Existing

One-third, or \$500,000, benefit to existing share has been identified for this service area as the costs included are primarily related to future growth but will also provide a benefit to existing residents.

viii. Relation to Funding from GFT (if applicable) and Other Funding

No funding is anticipated from development charges or parkland dedication for this service. In total, \$454,458 will be funded from other revenue sources.

ix. Share of Net Capital Costs Related to CBC Eligible Developments

The total CBC eligible cost is \$545,542 (55 per cent) of the development-related costs.

G. Tree Canopy Expansion

i. Service Description

This service area includes various capital costs related to annual tree purchases.

ii. Service Delivery and Service Levels Consideration

The Town's Official Plan provides policies relating to the protection and enhancement of natural heritage features including the tree canopy.

iii. Estimate of Need

The Town proposes to add 100 new trees to the tree canopy annually. As the Town grows and vacant lands are developed, there is an increased need to expand the tree canopy to provide passive recreation and health benefits for residents. Therefore, costs related to the tree canopy are included in the CBC capital program.

iv. Consideration of Excess Capacity

There is no excess capacity available within the Town's tree canopy expansion and the costs included in the CBC strategy relate to incremental needs arising from development over the 10-year planning horizon.

v. Capital Cost

The gross capital cost included is \$1.50 million.

vi. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

No grants, subsidies or other contributions have been identified for this service.

vii. Consideration of Benefit to Existing

No benefit to existing shares have been identified for this service area.

viii. Relation to Funding from GFT (if applicable) and Other Funding

Provision of tree canopy expansion is not funded from development charges or parkland acquisition. The non-CBC shares of projects will be funded from other revenue sources.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The total CBC eligible cost is \$818,312 (55 per cent) of the development-related costs. The remaining \$681,688 will be considered for funding from other sources.

H. Lighting Improvements

This service area includes annual lighting improvements throughout the Town of Innisfil.

i. Service Description

Lighting improvements allow for public spaces to be made available in a way that is safe and inviting. It allow extends parks programming trail usage throughout the year and 24 hour period.

ii. Service Delivery and Service Levels Consideration

Lighting improvements, if not included as part of new park development costs, is would be funded through the Town's tax base.

iii. Estimate of Need

Included in this service area are costs related to lighting improvements to allow for additional usage of existing parks and trail spaces.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$1.00 million over the 10-year planning period.

vi. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

Given the provision for lighting improvements are net new acquisitions, no replacement or benefit to existing shares have been identified for this service area.

viii. Relation to Funding from GFT (if applicable) and Other Funding

None of the identified project costs have funding from development charges.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The total CBC eligible cost is \$545,542 (55 per cent) of the development-related costs. The remaining \$454,458 will be considered for funding from other sources.

I. Affordable Housing

The need for affordable housing increases as a municipality's population grows. Under the provincial statute, Simcoe County lacks the ability to levy CBCs for infrastructure or services related to affordable housing; the municipality, however, is permitted to use CBCs as a growth funding tool to create affordable housing units.

i. Service Delivery and Service Levels Consideration

Innisfil is currently in the process of developing a new Housing Strategy² which will identify how the Town can contribute to, and foster the creation of, affordable housing units. Although the Housing Strategy is not finalized, preliminary discussions with Town staff suggest CBC funding may cover up to 10 units per year in the Town of Innisfil.

ii. Estimate of Need

Preliminary discussions of affordable housing initiatives for the Town suggests that 10 per cent of all units should be targeted as affordable. Further refinements to targets and estimates will be made through the Housing Strategy. Of the 10 per cent of units, approximately 10 units per year may be funded from CBCs.

iii. Consideration of Excess Capacity

No deductions for excess capacity have been made for the affordable housing provision identified in the CBC capital program.

iv. Gross Capital Cost

The gross capital cost of the program is \$9.60 million over the 10-year period from 2023-2032. Eligible costs may include planning application fees and other capital costs associated with the development of affordable housing units in high-density buildings which will be further identified through the Housing Strategy and subsequent staff reports.

² Additional information on the development of the new Housing Strategy can be found here: <https://www.getinvolvedinnisfil.ca/housing>

v. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vi. Consideration of Benefit to Existing

Given that only a small portion of the total potential affordable housing units have been included in the CBC Strategy, and recognizing that the 10 units per annum relate to high-density development, no benefit to existing shares have been applied.

vii. Relation to Funding from GFT (if applicable) and Other Funding

Given the legislative changes arising from Bill 23, affordable housing will not be included as a service in the Town of Innisfil's 2023 Development Charges Study. As such, no development charges or other growth funding tools have been identified for this service area.

viii. Share of Net Capital Costs related to CBC Eligible Developments

The amount eligible for recovery from CBCs is 100% or \$9.60 million.

J. Green Building Retrofits

i. Service Description

Green Building Retrofits accounts for new additions to existing infrastructure such as green roofs, low impact development etc.

ii. Service Delivery and Service Levels Consideration

Green building retrofits would be funded through the Town's tax base.

iii. Estimate of Need

Included in this service area are costs related to building improvements to support energy efficiency and reduce greenhouse gas emissions.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$1.00 million over the 10-year planning period.

vi. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

A 33% or \$333,333 benefit to existing share is related to the construction of the green building retrofits and is deemed to benefit existing residents.

viii. Relation to Funding from GFT (if applicable) and Other Funding

No portion of this project has funding from other growth funding tools. Other funding sources will be used to fund the non-CBC eligible share.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The amount eligible for recovery from CBCs is 55 per cent or \$363,694. The remaining \$302,972 will be considered for funding from other sources.

K. Traffic Calming Measures

i. Service Description

Traffic Calming Measures includes various capital costs and projects related to traffic calming as recommended through the Traffic Calming Strategy.

ii. Service Delivery and Service Levels Consideration

The service is currently funded from property taxes, alternative revenue sources and development charges. The Town's current 2018 DC Background Study includes a historical service level description of roads and related services, which includes traffic calming measures.

iii. Estimate of Need

As the Town continues to grow and intensify, this will put pressure on the existing road network. Some of these needs are funded from development charges however the increased needs arising from high-density development are not fully eligible to be recovered from DCs; CBCs are a tool that can be used to fund a share of these increased needs.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$500,000 over the 10-year planning period.

vi. Identification of Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

A 33% or \$166,667 benefit to existing share is related to the construction of the green building retrofits and is deemed to benefit existing residents.

viii. Relation to Funding from GFT (if applicable) and Other Funding

None of the cost included in the CBC Strategy are currently included in the Town's 2018 DC Background Study. Therefore, no contributions from DCs for this project is anticipated.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The amount eligible for recovery from CBCs is 42 per cent or \$140,527, which reflects that the project will also provide a benefit to non-residential development. The remaining \$192,807 will be considered for funding from other sources.

L. Bicycle Lane Painting

i. Service Description

Bicycle Lane Painting includes painting roads in the Town of Innisfil to promote active living within the community.

ii. Service Delivery and Service Levels Consideration

This is a new program being introduced by the Town. The Town's current 2018 DC Background Study includes a historical service level description of roads and related services, which includes traffic calming measures.

iii. Estimate of Need

The transportation mode shares of higher density developments generally skew to non-car mode shares such as biking, walking and other forms of active transportation. Therefore, costs related to active transportation are included in the CBC capital program.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$2.00 million over the ten year planning period.

vi. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

A 33% or \$666,667 Benefit to Existing share is related to the construction of the green building retrofits and is deemed to benefit existing residents.

viii. Relation to Funding from GFT (if applicable) and Other Funding

None of the cost included in the CBC Strategy are currently included in the Town's 2018 DC Background Study. Therefore, no contributions from DCs for this project is anticipated.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The amount eligible for recovery from CBCs is 42 per cent or \$562,107, which reflects that the project will also provide a benefit to non-residential development. The remaining \$771,226 will be considered for funding from other sources.

M. General Government - Studies

i. Service Description

General Government – Studies includes costs previously eligible for DC funding. These projects include growth-related studies for a range of Town services including Fire, Library, Planning, Finance etc.

ii. Service Delivery and Service Levels Consideration

Prior to the recent legislative changes introduced through Bill 23, the Town used development charges and the Alternative Revenue Source(ARS) Reserve Fund to fund studies.

iii. Estimate of Need

Included in this service area are costs related to master plans and studies to provide to residents and employees within the Town of Innisfil.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$6.06 million over the 10-year planning period.

vi. Identification of any Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

A 45 per cent or \$2.72 million benefit to existing share is removed from the total development related costs.

viii. Relation to Funding from GFT (if applicable) and Other Funding

None of the identified projects have funding from other growth funding tools.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The amount eligible for recovery from CBCs is 42 per cent or \$1.40 million, which reflects that the project will also provide a benefit to non-residential development. The remaining \$1.93 million will be considered for funding from other sources.

N. Urban Parks

i. Service Description

The Urban Park Facilities capital program includes costs related to the delivery and development of park space in accordance with the Town's preliminary draft Land and Lake Master Plan which is currently underway.

As high-density developments occur in the Town, the need for public greenspace intensifies given many new households will not have private outdoor space. DCs, *Planning Act* s.42 parkland conveyance, and other growth funding tools will not fully meet the parkland needs arising from high-density residential development; CBCs provide a mechanism to fund a share of the increased development need.

ii. Service Delivery and Service Levels Consideration

The Town's draft preliminary Land and Lake Plan Master Plan identifies a service level target of 3.5 ha per 1,000 people. High-density development will result in an incremental increase in urban park need over and above existing historical service level standards in the Town.

iii. Estimate of Need

High-density development places a greater demand for urban parks and associated amenities. Decreased access to private greenspace leads to higher use of new and existing parks in high-density neighbourhoods such as the planned Orbit community. Further exacerbated by COVID-19, urban parks now more than ever, are seen as a vital component of a complete community.

The need for urban parks, driven by CBC eligible developments in new growth areas of the Town such as Orbit, is based on the anticipated population growth in these units and the associated demand on infrastructure over and above historical service level standards. The capital program assumes the need to construct 37.8 ha of parkland valued at \$50,000 per hectare (which exceeds historical service level standards) for future high-density development. As such, the capital costs are fully attributable to CBC eligible developments.

iv. Consideration of Excess Capacity

There is no excess capacity available within the Town's existing parks network in areas that will experience high-density residential development. The costs included in the CBC strategy are related to incremental needs arising from development over the 10-year planning horizon.

v. Capital Cost

The gross capital cost of the service identified is \$1.64 million.

vi. Identification of Anticipated Capital Grants, Subsidies or Other Contributions

No grants, subsidies or other contributions have been identified for this service.

vii. Consideration of Benefit to Existing

Benefit to existing shares have not been identified for this service area as the costs included are entirely related to future development.

viii. Relation to Funding from GFT (if applicable) and Other Funding

No development charges or other growth-funding tools have been identified for this service as it is a new provision over and above existing service level standards. However, the CBC capital program and CBC eligible share may be adjusted following the completion of the Town's 2023 DC Background Study in order to reflect funding from future development charge revenues.

ix. Share of Net Capital Costs related to CBC Eligible Developments

Projects included in the Urban Parks capital program have been deemed fully CBC eligible.

O. Community Facilities

i. Service Description

Community Facilities service area encompasses a variety of facilities available to residents of the Town of Innisfil. Community facilities include banquet halls, meeting rooms, ice and slab space, pavilions, community centres, libraries and other facilities for the delivery of programming in the Town.

As the Town continues to grow, especially as new high-density developments are brought forward, there is a need to construct new community facilities and expand existing facilities. The capital costs identified in the CBC Strategy are intended to address additional demands on community facilities arising from high-density development which is not captured in the Town's DC Background Study. CBCs can also assist in funding a share of development-related community facility needs that are not eligible for funding under development charges or other growth-funding tools.

ii. Service Delivery and Service Levels Consideration

Based on the Town's 2021 DC Background Study, Innisfil has historically maintained a service level of approximately \$3,000 per capita for Indoor Recreation and Library services. An updated inventory will be prepared as part of the 2023 DC Background Study.

iii. Estimate of Need

The need for community facilities, driven by CBC eligible developments in new growth areas of the Town such as Orbit, is based on the anticipated population growth in these units and the associated demand on infrastructure over and above historical service levels. As such, the capital costs are fully attributable to CBC eligible developments.

iv. Consideration of Excess Capacity

Excess capacity has not been identified for this service area.

v. Capital Cost

The capital costs included in the CBC Strategy totals \$9.36 million and includes a provision for additional library and indoor recreation facilities, based on an assumption of \$1,000 per capita for high-density developments.

vi. Identification of Anticipated Capital Grants, Subsidies or Other Contributions

No grants, subsidies, or other recoveries have been identified for this service area. However, the CBC capital program and CBC eligible share may be adjusted following the completion of the Town's 2023 DC Background Study in order to reflect funding from future development charge revenues.

vii. Consideration of Benefit to Existing

No benefit to existing shares have been identified as the capital cost reflects net new facilities.

viii. Relation to Funding from GFT (if applicable) and Other Funding

No other development charges or other growth-funding tools have been identified for this service. However, the CBC capital program and CBC eligible share may be adjusted following the completion of the Town's 2023 DC Background Study in order to reflect funding from future development charge revenues.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The net capital cost associated with community facilities CBC eligible developments is \$9.36 million.

P. Active Transportation

i. Service Description

The Active Transportation service area includes provisions for active transportation improvement locations throughout the Town of Innisfil as recommended in the Transportation Master Plan.

ii. Service Delivery and Service Levels Consideration

Recognizing the increased in need for servicing arising from high-density development, particularly in new development areas such as Orbit, an assumption of \$500 per capita for CBC eligible developments has been identified.

iii. Estimate of Need

The need for active transportation infrastructure, driven by CBC eligible developments in new growth areas of the Town such as Orbit, is based on the anticipated population growth in these units and the associated demand on infrastructure. As such, the capital costs are fully attributable to CBC eligible developments.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$4.68 million over the 10-year planning period.

vi. Identification of Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

Given the provision for active transportation relates to net new infrastructure construction, no replacement or benefit to existing shares have been identified for this service area.

viii. Relation to Funding from Other GFT (if applicable)

No other development charges or other growth-funding tools have been identified for this service. However, the CBC capital program and CBC eligible share may be adjusted following the completion of the Town's 2023 DC Background Study in order to reflect funding from future development charge revenues.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The total growth related cost of \$4.68 million is deemed to be related to CBC developments.

Q. Public Realm

i. Service Description

The Public Realm service area includes capital costs related to the provision for improvements to public places.

ii. Service Delivery and Service Levels Consideration

Public realm improvements are currently funded through the Town's tax base.

Recognizing the increased in need for servicing arising from high-density development, particularly in new development areas such as Orbit, an assumption of \$500 per capita for CBC eligible developments has been identified.

iii. Estimate of Need

The need for public realm infrastructure, driven by CBC eligible developments in new growth areas of the Town such as Orbit, is based on the anticipated population growth in these units and the associated demand on infrastructure. As such, the capital costs are fully attributable to CBC eligible developments.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$4.68 million over the ten year planning period.

vi. Identification of Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

No replacement or benefit to existing shares have been identified for this service area.

viii. Relation to Funding from Other GFT (if applicable)

None of the identified project costs have funding from other growth funding tools.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The total growth related cost of \$4.68 million is deemed to be related to CBC developments.

R. Protection Services

i. Service Description

Protection Services includes capital costs related to the protection of the lives and property of the residents of the Town of Innisfil which includes fire and police services.

As the Town continues to grow, especially as new high-density developments are brought forward, there is a need to construct new protection services buildings and expand existing facilities. The capital costs identified in the CBC Strategy are intended to address additional demands on community facilities arising from high-density development which is not captured in the Town's DC Background Study.

ii. Service Delivery and Service Levels Consideration

Protection Services improvements are currently funded through the Town's development charges and alternative revenue source. The Town's 2018 DC Background Study provides a summary of the historical service level standard associated with these assets. An updated inventory will be prepared as part of the 2023 DC Background Study.

iii. Estimate of Need

The need for fire and police infrastructure, driven by CBC eligible developments in new growth areas of the Town such as Orbit, is based on the anticipated population growth in these units and the associated residential demand on infrastructure. As such, the capital costs are fully attributable to CBC eligible developments.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$4.68 million over the 10-year planning period, based on an assumption of \$500 per capita for CBC eligible developments.

vi. Identification of Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

No replacement or benefit to existing shares have been identified for this service area.

viii. Relation to Funding from Other GFT (if applicable)

No other development charges or other growth-funding tools have been identified for this service. However, the CBC capital program and CBC eligible share may be adjusted following the completion of the Town's 2023 DC Background Study in order to reflect funding from future development charge revenues.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The total growth related cost of \$4.68 million is deemed to be related to CBC developments.

S. Civic Administration

i. Service Description

The cost of the CBC Strategy itself is eligible under the Act and included in this service category. Costs related to supporting the administration of the CBC Strategy and By-law, including a provision for land appraisals, is also included.

ii. Service Delivery and Service Levels Consideration

Inclusion of the CBC Strategy and implementation is intended to address new requirements of administering the program in response to growth.

iii. Estimate of Need

Included in the cost provision are regular updates to the CBC Strategy as well as the cost of dispute resolutions, legal costs, and other costs related to implementing and administering the Strategy and By-law. While the capital program represents a point-in-time analysis of the anticipated CBC-eligible project costs over the 2023-2032 period, similar needs are anticipated to continue beyond the 10-year planning horizon.

iv. Consideration of Excess Capacity

No excess capacity exists for this service.

v. Capital Cost

The gross cost included in the capital program totals \$1.00 million over the 10-year planning period.

vi. Identification of Anticipated Capital Grants, Subsidies or Other Contributions

There are no grants, subsidies or other contributions identified for this service area.

vii. Consideration of Benefit to Existing

No replacement or benefit to existing shares have been identified for this service area.

viii. Relation to Funding from Other GFT (if applicable)

No development charges or other growth funding tools have been identified for this service area.

ix. Share of Net Capital Costs related to CBC Eligible Developments

The entire cost of the CBC Strategy implementation of \$1.00 million is deemed eligible for funding through CBCs.

5. CBC Revenue Analysis and Rate Structure

A. CBC Capital Needs Greater than Projected CBC Revenue

As described above in Section 4, the total cost of the CBC-eligible capital program is \$40.93 million and exceeds the total forecasted revenue of \$5.70 million.

Based on current Town development data, a sample of potential CBC eligible developments was utilized and current market land values were estimated based on land value estimates from neighbouring municipalities. It is noted, that land values at the time of building permit can vary considerably across, and within, geographies.

Applying the legislated four per cent (4%) cap, it is anticipated that the average unit will contribute approximately \$1,000 in CBCs. As discussed in Section 4, the total cost of the CBC-eligible capital program over the same 2023-2032 period is \$45.14 million. As such, it is evident that the capital needs cannot be fully funded by potential CBC revenues.

Table 5: Estimate of Potential CBC Revenues, 2023 – 2032

Area	# of CBC Eligible Units	4% of Land Value per Unit	CBC Revenue
Total Units	5,700	\$1,000	\$5,700,000

Hemson and Town staff are exploring a charge per unit rate structure. If this rate structure is used, it is recommended the Town consider variable rates reflecting geographic and density locations, as well as other factors that affect land values. As such, some geographies will pay more than the identified \$1,000 per unit average and some will pay less.

B. Rate Structure Considerations

Hemson is currently working with staff on developing a CBC rate structure. This includes consideration of a per cent of land value or a charge per unit. As per the legislation, the value of the land to which the charge applies is determined as the value on the day before the issuance of a building permit, or the first building permit if the development requires multiple permits.

If the Town does not proceed with a charge based on a per cent of land value, and instead implements a charge per unit, it is recommended that the determination of the charge be based on land values, with consideration for variations in land values by geography and density, and be adjusted annually and reviewed at a minimum every five years. The Town will also reserve the right to undertake site specific appraisals if there is a reason to believe the charge per unit assumption may be understated.

Developments that meet the criteria set out in Section 37 (4) of the Act will be subject to the charge excluding those listed as exempt under O. Reg. 509/20.

C. Land Appraisal Process

If a per cent of land value rate is used, individual CBC obligations will be calculated based on the market value of the site on the day before issuance of the first building permit. However, if a charge per rate is implemented, the Town will identify the applicable rate by area.

Payment is required prior to the issuance of a building permit by the Town. In accordance with subsection 37 (44) of the Act, if the developer considers the charge to be higher than four per cent (4%) of land value, they are permitted to submit a payment under protest and must submit an alternate appraisal within 30 days. The Town then has 45 days to provide the appraisal upon which the charge was based.

D. CBC Special Account

i. Existing Reserves

Existing reserves to be transferred to the CBC Special Account include any unspent or unallocated portions of the legacy General Government DC reserve less any prior commitments.

ii. CBC Reserve

Subsection 37 (45) of the Act requires that a single CBC special account be established. This is unlike DC reserves which are dedicated to specific service areas as defined in the DC by-law. The funds in the CBC reserve will include any existing reserves from non-eligible DC services and CBC monies collected.

Annually, the Town must allocate or spend 60 per cent of the funds in the special account to CBC-eligible projects. The following information shall be provided to the public each year in the respect of the preceding year:

1. Statements of the opening and closing balances of the special account and of the transactions relating to the account.
2. In respect of the special account referred to in subsection 37 (45) of the Act, statements identifying,
 - i. facilities, services and matters acquired during the year with funds from the special account;
 - ii. details of the amounts spent; and
 - iii. for each facility, service or matter mentioned in subparagraph i, the manner in which any capital cost not funded from the special account was or will be funded.

3. In respect of the special account referred to in subsection 42 (15) of the Act, statements identifying,
 - i. land and machinery acquired during the year with funds from the special account;
 - ii. buildings erected, improved or repaired during the year with funds from the special account;
 - iii. details of the amounts spent; and
 - iv. for each asset mentioned in subparagraphs i and ii, the manner in which any capital cost not funded from the special account was or will be funded.
4. The amount of money borrowed from the special account and the purpose for which it was borrowed.
5. The amount of interest accrued on any money borrowed from the special account.

E. Statutory Exemptions

O. Reg. 509/20 includes the following statutory exemptions:

1. Development or redevelopment of a building or structure intended for use as a long-term care home within the meaning of subsection 2 (1) of the Long-Term Care Homes Act, 2007.
2. Development or redevelopment of a building or structure intended for use as a retirement home within the meaning of subsection 2 (1) of the Retirement Homes Act, 2010.
3. Development or redevelopment of a building or structure intended for use by any of the following post-secondary institutions for the objects of the institution:

- i. a university in Ontario that receives direct, regular and ongoing operating funding from the Government of Ontario,
 - ii. a college or university federated or affiliated with a university described in subparagraph i,
 - iii. an Indigenous Institute prescribed for the purposes of section 6 of the Indigenous Institutes Act, 2017.
- 4. Development or redevelopment of a building or structure intended for use as a memorial home, clubhouse or athletic grounds by an Ontario branch of the Royal Canadian Legion.
- 5. Development or redevelopment of a building or structure intended for use as a hospice to provide end of life care.
- 6. Development or redevelopment of a building or structure intended for use as residential premises by any of the following entities:
 - i. a corporation to which the Not-for-Profit Corporations Act, 2010 applies that is in good standing under that Act and whose primary object is to provide housing,
 - ii. a corporation without share capital to which the *Canada Not-for-profit Corporations Act* applies, that is in good standing under that Act and whose primary object is to provide housing,
 - iii. a non-profit housing co-operative that is in good standing under the Co-operative Corporations Act. O. Reg 509/20, s. 1, 8.

In addition, recent legislative changes introduce to the Act through Bill 23 have provided exemptions for attainable and affordable housing. The province has yet to define these housing types, as such the exemption is not yet in force. Hemson anticipates that legislative changes will likely occur in 2023 and will supersede the policies identified in the CBC By-law.

6. Implementation & Administration

A. Consultation

The Act requires that a municipality consult with such persons and public bodies as the municipality considered appropriate. Subsection 37 (10) indicates that, at the discretion of the Town, consultation shall be conducted. For the CBC Strategy, the Town met with the development industry and Council in early 2023 and has provided information for public review:

- An information meeting was held with the development industry on March 2, 2023.
- An information meeting was held with Council on March 8, 2023.
- The draft CBC Strategy will be posted on the Town's website in late March 2023, in advance of a formal public meeting.
- A formal public meeting is anticipated to be held on April 19, 2023, ahead of the by-law being presented to Council for passage.

B. By-Law Passage, Notice and Appeal Provisions

The CBC By-law is anticipated to be passed in April 2023. The commencement of the by-law will be on the date the by-law is passed or the specified in the by-law, whichever is later in accordance with subsection 37 (11) of the Act.

A notice of passage is required to be provided no later than twenty days after passage, subsection 37 (13) of the Act. Furthermore, O.Reg. 509/20 subsection 4(2) states that a notice shall be given to every owner of land in the area to which the by-law applies, every person and organization that has written request for the notice, upper-tier municipalities, school boards and by publication in a newspaper of sufficient general circulation.

A CBC by-law may be appealed to the Ontario Land Tribunal within 40 days of passage by filing with the clerk of the Town. The Tribunal is limited in its ability to amend the CBC By-law including not being able to increase the amount of CBCs that will be payable in any particular case, add, remove or reduce the scope of an exemption, change a provision for a phasing in so as to make the charges payable earlier and change the date the by-law will expire.

C. Treatment of In-Kind Contributions

The Town may allow developers to pay CBCs in part or in whole with in-kind contributions. Such contributions will be evaluated on a case-by-case basis. The Town may require that an agreement be registered on title for the provision of these contributions.

Paragraphs 6-8 of subsection 37 of the Act guide the legislative framework for the consideration of in-kind contributions:

In-kind contributions

(6) A municipality that has passed a community benefits charge by-law may allow an owner of land to provide to the municipality facilities, services or matters required because of development or redevelopment in the area to which the by-law applies. 2020, c. 18, Sched. 17, s. 1.

Notice of value of in-kind contributions

(7) Before the owner of land provides facilities, services or matters in accordance with subsection (6), the municipality shall advise the owner of land of the value that will be attributed to them. 2020, c. 18, Sched. 17, s. 1.

Agreement re facilities, services or matters

(7.1) If the municipality intends to allow an owner of land to provide facilities, services or matters in accordance with subsection (6), the municipality may require the owner to enter into an agreement with the municipality that addresses the provision of the facilities, services or matters. 2022, c. 21, Sched. 9, s. 10 (1).

Registration of agreement

(7.2) An agreement entered into under subsection (7.1) may be registered against the land to which it applies and the municipality is entitled to enforce the agreement against the owner and, subject to the *Registry Act* and the *Land Titles Act*, against any and all subsequent owners of the land. 2022, c. 21, Sched. 9, s. 10 (1).

Deduction of value of in-kind contributions

(8) The value attributed under subsection (7) shall be deducted from the amount the owner of land would otherwise be required to pay under the community benefits charge by-law. 2020, c. 18, Sched. 17, s. 1.

The CBC by-law will provide for the potential acceptance of CBC in-kind contributions consistent with the legislative requirements.

D. CBC Payment Dispute Mechanism

Developers may dispute the CBC charge by paying in protest and submitting an alternate appraisal. If the appraisals are within 5 per cent (5%) of each other the Town must refund the difference (see outcome in Table 6). However, if the appraisal difference is greater than 5 per cent (5%), the Town will request the developer to select one of three appraisers from a Town list. That will be the final appraisal and if it results in a lower CBC rate than paid, the Town must refund the difference. Table 6 below provides a summary of the appraisal and dispute process.

Table 6: Payment Dispute Mechanism

	Planning Act	Timing	Action	Outcome
Charge as set by Town	37(44)	Building permit	Developer pays	Payment received – process complete
			Developers pays under protest	New appraisal required
Payment under protest	37(33)	30 days	Developer submits appraisal to Town	Town review need for new appraisal or accept value
Town disputes developer's value	37(35)	45 days	Town submits appraisal to applicant	Joint review - if less than 5 percent difference, use higher value
Arbitrated value	37(38)	60 days	Applicant picks appraiser from Town roster	New appraisal sets value
In-kind contribution	37(7)	Before providing service / facility	Town to advise applicant of in kind value	No appeal process, value is deducted from charge

Appendix
Draft CBC By-law
(to be made available
under separate cover)



JHSC Meeting Agenda

MEETING DATE: Thursday, March 16, 2023

TIME: 1:00PM

LOCATION: Ops Meeting Room 2 and Teams

CO-CHAIRS: Management Co-Chair – Eric Chudzinski; Worker Co-Chair Richard Rivet

MINUTES: Jennifer Miyasaki

ATTENDANCE Nick Ayers, Eric Chudzinski, Jennifer Miyasaki, Richard Rivet, Ken Schuyler, Jennifer Sheremeto, Paul Tomaszewski, Sierra Warren, Kristi Williams

REGRETS

Item	Agenda Item	Lead	Item Details	ACTION & NOTES
1.	<u>Call Meeting to Order</u>	Co-Chair	- Time – opened	- Meeting started at 1:04 p.m.
2.	<u>Approval of Previous Minutes</u>	Co-Chair	2023.02.09 JHSC Meeting Minutes Complete.pdf (Desktop, Web, Mobile)	- Jen M. motioned to approve the minutes of the previous meeting. - Seconded by Paul T. - All in favour; Motion Carried.
3.	<u>JHSC members</u>	Co-Chair	02.09.23 JHSC Members February 2023 (Desktop, Web, Mobile)	- No member changes from previous month - Paul Tomaszewski received certification - ACTION: Jennifer M create a document collection
4.	<u>Workplace Inspections WHIMIS LOTO</u>	Co-Chair	Roundtable discussions.	Richard – Inspections went well; had issues with tablet; changing process – instead of logging minor housekeeping issues as hazards, will use maintenance request to streamline process Jennifer M – All facilities inspected on March 3 rd and 6 th ; no deficiencies to report; Issues with MOAR were resolved and SDS inspections were completed and logged successfully. Nick – Inspections completed today at IRC; failsafe for natural gas detector in IRC where Zamboni is stored wasn't working – natural gas was leaking in the building; tech came in and mentioned it should be inspected monthly – this was not being done; brought to

				<p>supervisor's attention; seeking guidance on how to rectify;</p> <p>Also, CO and CO2 detectors have not been working for some time; need to confirm purpose and safe working levels – need to ascertain what the legal requirement is.</p> <p>ACTION: Nick and Eric to work with Parks/Facilities Managers to determine inspection requirements for natural gas failsafe/detector</p> <p>ACTION: Nick and Eric to work with Parks/Facilities Managers to determine purpose and requirements for CO/CO2 detectors at the IRC.</p> <p>Paul – Everything is in good shape; no open MOAR cases</p> <p>Kristi – Encountered some barriers in inspecting Rizzardo – not everything on list is applicable; suggested changing the inspection form in MOAR to have site specific inspections checklists</p> <p>ACTION: Send inspection feedback to Eric to amend inspection forms in MOAR to be more site specific</p> <p>Sierra - Richard and Sierra inspected Ec Dev – everything was fine; Knock School – emergency exits were not cleared of snow; MOAR had issues during the update – fixed now</p>
5.	<u>SOP's Corporate Policies</u>	Co-Chair	Any updates for discussion?	<ul style="list-style-type: none"> - Eric, Richard and Sierra have been working on closing them out; hoping to complete updates and have ready for approvals by the end of March.
6.	<u>Workplace Incidents & Accidents</u>	Co-Chair	Reported on last month's accidents	<ul style="list-style-type: none"> - Slips and falls in parking lots; Operations is aware of issues and working with snow removal to improve conditions – have seen some improvement; awareness posted on Yammer to report icy conditions to supervisor/customer service - Staff member reversed into a vehicle; safe practices were reviewed - Staff member was removing plow from truck and was injured; no first aid required; incident report completed
7.	<u>Budget & Training</u>	Co-Chair	1. Member Certification/ Refresher	<ul style="list-style-type: none"> - \$6500 for training and development; \$1000 for materials; includes expenses for Fire & Rescue JHSC as well. - Required certifications and refreshers have been added to the budget and are being scheduled - ACTION: Eric to determine if new OHSA Books are needed (current copies are 2022 version)

8.	<u>JHSC</u> <u>Other</u> <u>Business</u>	All Members	1. BBQ 2. Workplace Risk Assessments 3. Naloxone Kits in the Workplace (coming into force June 1, 2023) 4. Tablets for inspections – items to be added	1. Suggested date is June 15; safety items for a giveaway to staff; games and food – confirm budget; Jenn S and Sierra will communicate with CAOs office to coordinate materials/resources; will arrange for a caterer; Ops building/lot is the suggested location; Invite Fire Services for fire safety piece; A shared document will be created to assign tasks and track progress of the event ACTION: Jenn S and Sierra will contact our partners to coordinate participation (Fire Services, CAO) 2. Violence risk assessments; Eric is heading up this initiative; will be reaching out with questions to determine risk and create recommendations 3. Legislation required as of June 1, 2023 that Naloxone be available in workplace https://www.ontario.ca/page/naloxone-workplace - Risk assessment and information gathering stage 4. Requested a process change for reporting issues in MOAR - Smartsheet to report a maintenance request instead of reporting as a hazard in MOAR if it's something small like a light bulb to be changed or minor housekeeping issue.
9.	<u>ACTION</u> <u>ITEMS</u> <u>Follow up</u>	Co-Chair	Review of Action items from February 9, 2023, meeting minutes.	- ACTION – Eric asked that we provide him with a list of who is doing what inspections in what facilities and when. Jennifer S and Jennifer M will work on creating a current list of inspection locations. - Completed - ACTION – Please add Centennial Park to the inspection list. - Completed - JHSC Facilities List.xlsx (Desktop, Web, Mobile)
10.	Close Meeting	Co-Chair	- Time enter of meeting closed.	- Meeting closed at 2:37.p.m.

Policy Changes Summary

8a. **EMPLOYMENT – Reporting Absenteeism and/or Lateness Policy #E-2023-08**

- Updated wording to be consistent with the Employment - Leave of Absence Policy with respect to allotment of discretionary hours for staff.
- Updated to include gender neutral terms
- Minor wording changes

8b. **EMPLOYMENT – Self Funded Leave Policy #E-2023-09**

- Changed to include all Permanent staff
- Added: ***Other Benefits & Entitlements***
 - Any corporate benefits for which the employee is eligible either at the time of, or throughout the duration of the leave will be maintained (i.e. vacation, discretionary time).
 - An employee will continue to earn credit for length of service and length of employment while on leave.

8c. **OPERATING AND TECHNOLOGY – Collections Management Policy #2023-10**

- Added: The collection will be intentionally developed to promote equity, inclusion, and diversity, with particular attention to materials that expand access to Indigenous content and knowledge or support progress towards truth and reconciliation.
- Added: The Library recognizes the right of any individual or group to reject Library material for personal use, but does not accord to any individual or group the right to restrict the freedom of others to make use of that same material.
- Pages 7 & 8: addition of Merchandising and Promotion; Requests for Reconsideration
- Added: Guidance in the choice of Library materials for children, as well as limitations on use and ongoing monitoring, are the sole responsibility of the child's parent or legal guardian, as outlined in the Library's Children's Services Policy
- Updated Appendix#1



SUBJECT: EMPLOYMENT – REPORTING ABSENTEEISM AND/OR LATENESS POLICY

Policy No: E-2023-08 DRAFT

Date: April 17, 2023

Review Date: April 2027

Pages: 2

PURPOSE

The purpose of this policy is to provide guidelines for Innisfil Public Library Staff Members to report any unscheduled absences from work.

POLICY

General

For the purposes of this policy, lateness will be considered an unscheduled absence from work.

Although *The Employment Standards Act (ESA)* provides the parameters which govern many types of leaves of absence, all leave requests must ultimately be communicated to the CEO or designate as soon as is possible. Except as specified in the *ESA*, the granting of leaves, or the use of vacation or lieu days to cover unpaid leave (including discretionary hours as set out in the Leave of Absence Policy) or any decisions regarding leave remuneration issues are at the sole discretion of the CEO.

If an employee is absent for a length of time beyond policy/*ESA* specified parameters or as approved by the CEO, an investigation will be initiated. If the employee fails to cooperate with the investigation or cannot provide

appropriate justification for the unauthorized absence, the employee shall be deemed to be absent without leave and this may result in discipline up to and including termination of employment, unless otherwise justified.

Application

This policy applies to all Innisfil ideaLAB & Library Staff Members.

Definitions

'Reporting Manager' is defined as the management team member who is assigned to monitor and review an employee's performance.

Guidelines

General Guidelines

1. Responsibility to Report Absence

All Staff Members are expected to communicate all absences to their Reporting Manager, who will adjust schedules as needed.

2. Responsibility to Report Lateness

If any employee is aware that they will be unable to report for their scheduled shift on time, the employee shall inform the Manager or Designate as early as possible.

3. Failure to Report

Absence/lateness not reported as outlined in this policy shall be deemed to be absence without leave and may result in discipline up to and including termination of employment, unless otherwise justified.

Related Policies:

EMPLOYMENT - Leave of Absence Policy

Employment Standards Act, 2000, S.O. 2000, c. 41

Approved by the Innisfil Public Library Board, April 17, 2023,

Motion Number: 2023.XX

Supersedes Policy #E-2019-09, approved April 15, 2019, Motion #2019.36; and Policy #E-2015-19, approved December 14, 2015, Motion #2015.102; and Policy #E-2015-17, approved November 16, 2015, Motion #2015.93 & Policy #E-2011-22, approved November 21, 2011, Motion #2011.71; & Section 15 of the Town's Employee By-Law #038-06 appended to Policy #2006-20, approved June 12, 2006.



SUBJECT: EMPLOYMENT – Self-Funded Leave Policy **DRAFT**

Policy No: E-2023-09

Date: April 17, 2023

Review Date: April 2027

Pages: 4

PURPOSE

The purpose of this policy is to outline the details of a *Self-Funded Leave* for Staff, which provides opportunities for personal and professional growth and by its nature intends to promote work-life balance.

POLICY

General

This leave can be used for a variety of reasons, including but not limited to being appointed to a leadership role in a professional/volunteer organization, continuing education, caring for a family member, or travelling.

If applicable, returning employees will share the knowledge gained with other Staff.

Application

This policy applies to all Permanent Staff members who have satisfactorily completed their probationary period.

Definitions

A ***Self-Funded Leave*** is an authorized absence to a maximum of one year, where employees receive reduced pay during the period prior to the leave (the enrolment period) and are paid an amount equivalent to the difference between normal and reduced pay over the course of the leave period.

Guidelines

Responsibility

Library Management will be responsible for the review of and decisions regarding requests for leaves under this policy.

Leave Options

- a) **90% Option:** 4.5 years of work at 90% pay and 6 months of leave at 90% pay;
 - b) **80% Option:** 4 years of working at 80% pay and 1 year of leave at 80% pay; or 2 years of working at 80% pay and 6 months of leave at 80% pay;
 - c) **75% Option:** 3 years working at 75% pay and 1 year of leave at 75% pay; or 1.5 years working at 75% pay and 6 months of leave at 75% pay;
 - d) **Other:** Other options based on the principles set out in this policy will be considered.
- *Employees will receive the average rate of the percentage pay contributed during the enrollment period. The average could be affected by step increases, additional responsibility pay, etc.*
 - *The leave period must be taken all at once (i.e. cannot be split up).*

Eligibility Criteria

In order to be considered for the programme employees must meet the following criteria and maintain the criteria throughout the enrollment period. Failure to continue to meet these criteria during the enrollment period may result in the termination of the employee's participation in the programme

- Completion of probationary period;
- Positive performance review on file (within past year);
- No discipline incidents (within past year); and
- Subject to service area operational capacity.

Process

Employees may apply for enrollment at any time of the year for the *Self-Funded Leave* programme.

A *Self-Funded Leave* request must be submitted to the Employee's Reporting Manager for review and approval subject to service area operational requirements and after consideration of any potential conflicts of interest if the leave is for personal/professional opportunities. If the request is approved by the Employee's Reporting Manager, then it will move to the Library's Senior Management Team for consideration. If the denial for the leave is due to meeting operational requirements or if another individual from the service area has an already approved leave for that time, then Management may decide to approve the request and work with the employee to select an alternate time frame.

For approved *Self-Funded Leaves*, Managers must do an analysis of workload and budget availability to determine whether the employee's duties/responsibilities can be met departmentally, cross functionally or if the hiring of a contract/temporary worker is required.

Impact On Benefits

Benefit entitlements while on a *Self-Funded Leave* will be in accordance with the terms, conditions, and limitations of the benefit plans and programmes. Similarly, OMERS participation, contributions and applicable leave purchases will be subject to the OMERS pension plan terms and conditions.

Examples of potential benefit plan impacts, for eligible staff, include:

- Travel coverage limited to the maximum duration as outlined in the respective employee group benefit plans. Reimbursement of health and dental non-emergency claims will be in Canadian funds.
- Health and dental claims reimbursement (non-emergency) when travelling;
- Life insurance coverage to be adjusted based on reduced annual earnings for the duration of the programme;
- Short-Term and Long-Term Disability coverage while in the 'enrolment period' (i.e. at work) to be adjusted based on reduced annual earnings for the duration of the programme. Short-Term and Long-Term Disability programmes will be on hold during the actual leave period as the employee is 'not actively at work'. Programmes will resume when employee returns to work.
- Under the OMERS Plan, the leave period is considered broken service. When the employee returns from leave they have the option of buying back the cost of the period they were on leave and are required to pay both the employee and the employer's contribution to the pension plan, for the period of the leave. However, if the employee elects to purchase the period of broken service, the Library will make a one-time lump sum payment equal to the employer's contribution to the employee. This lump sum is a taxable benefit.

Full benefits and pension details/impacts will be included in the *Self-Funded Leave* agreement.

Other Benefits & Entitlements

- Any corporate benefits for which the employee is eligible either at the time of, or throughout the duration of the leave will be maintained (i.e. vacation, discretionary time).
- An employee will continue to earn credit for length of service and length of employment while on leave.

Terms of Enrollment

Library Management will work with the Town's People & Talent staff to draft a *Self-Funded Leave* agreement. Dependent upon the position, the employee may be required to have occasional/regular access to library email and/or their work cell phone. Individual leave agreements will include any specific arrangements.

In the case that the employee wishes to return early from the agreed upon leave, they must submit a request to their Manager. The request may be approved, denied or modified based on budgetary and operational needs.

Termination of the Programme

Employees may voluntarily withdraw from the programme based on the parameters outlined in the leave agreement. Following withdrawal from the programme, employees will have the option to receive repayment in the form of a lump sum payment (non-pensionable) or in bi-weekly installments for the amounts owing to them.

The Library reserves the right to end the *Self-Funded Leave* agreement at any time. A severance of employment for any reason, would result in the termination of the leave agreement and employees will be paid any amounts owing to them.

Related Policies

Leave of Absence Policy

Approved by the Innisfil Public Library Board, April 17, 2023
Motion Number: 2023.XX

Supersedes Policy #E-2018-03, Approved by the Innisfil Public Library Board, January 15, 2018, Motion Number: 2018.10



SUBJECT: COLLECTION MANAGEMENT POLICY **DRAFT**

Policy No: 2023-10

Date: April 17, 2023

Review Date: April 2027

Pages: 18 (*including appendices*)

PURPOSE

The purpose of the Collection Management Policy is to guide Staff in making decisions about the selection, management, and preservation of Library materials (in all formats, including print and digital/electronic); provide guidance on the allocation of Library budgets; and inform the public of the principles that govern collection development at the Innisfil ideaLAB & Library. This policy reflects the mission statement and strategic priorities of the Library. It constitutes a public declaration of the Library's commitment to the principles of free access to ideas and information and to providing collections that reflect a variety of viewpoints.

POLICY

General

The Innisfil Public Library Board recognizes that the community served includes persons of all ages, viewpoints and cultural backgrounds. The Library will provide equal access to information for all members of the community in an unbiased and non-judgmental environment. The Library's collection will attempt to reflect the community's diverse interests in a balanced way without implying endorsement of any particular view.

The Library will maintain a collection that is varied in age suitability, intellectual content and physical format which fosters, responds to and anticipates the educational, cultural, recreational and other information needs of the community within the framework of the **Ontario Public Libraries Act**, the *Ontario Library Association's Statement on the Intellectual Rights of the Individual* (Appendix #1); the Library's **Children's Services Policy** and **Youth Services Policy**; the **Canadian Criminal Code**, the Accessibility for

Ontarians with Disabilities Act (**AODA**), and any other applicable legislation.

Application

All who manage and use the collection of the Innisfil ideaLAB & Library.

Definitions

The term "**materials**" refers to all items in all formats, including print and digital/electronic, that comprise the intellectual content of the Library's collection.

The term "local author" refers to authors living in the Town of Innisfil or authors whose work(s) pertain to or are of interest to the Town of Innisfil.

The Term "self-published **author**" refers to an author whose work is printed independently and/or at one's own expense.

Guidelines

General Principles of Collection Development

Collection development at the Library is based on the principles of intellectual freedom, equal access for all and the preservation of the documentary record of culture. The Library provides a collection that balances viewpoints across a broad spectrum of opinion and subject matter in formats suitable to a variety of learning and recreational interests and skills. Using selection criteria that are flexible and responsive to the changing needs of the community, the Library builds and maintains a collection for the general public, while recognizing the need to reflect differences in perspective, authorship, audience and subject.

Selection Criteria

Library staff judge impartially and evaluate critically. Selection is made by use of authoritative book reviews, knowledge of the reputation and reliability of the author, selection aids such as authoritative discussions of the literature of the subject, pertinent bibliographical publications, publishers' advertising media and requests from library users. At times, the staff may consult with subject area specialists outside the institution to obtain advice about certain fields.

Assessment of materials for inclusion in the collection takes place on several levels: intellectual content, technical quality, and practical considerations. It is necessary that the material meet some, but not necessarily all, of the criteria established. The selection criteria defined below are considered when selecting materials for the Library's collections:

- Availability of funds and space
- Priced fairly for its production quality
- Relationship to existing collections and other material on the subject
- Interests and cultural composition of the community

- Diversity of content in relation to the Library's wider collection
- Popular demand and current needs
- Literary or artistic value
- Reputation, skill competence and purpose of the originator of the work
- Comprehensiveness and depth of treatment
- Quality, accuracy, and reliability of the information
- Clarity and logic of presentation
- Balance of viewpoints in the collection
- Timeliness or permanence of the work
- Suitability of format for library use
- Informs an understanding of or is designed for underrepresented groups and experiences
- Presents a uniquely Canadian viewpoint

The collection will be intentionally developed to promote equity, inclusion, and diversity, with particular attention to materials that expand access to Indigenous content and knowledge or support progress towards truth and reconciliation.

De-Selection and Collection Maintenance

The Library strives to maintain strong physical collections while increasing or providing access to content that reflects the growing demand for information, books, music and videos in digital formats. The Library's de-selection policy and procedures reflect this approach.

Selected materials are regularly assessed for their condition, accuracy, currency and usage, within the context of the Library collection, and relevance to Library users. The withdrawal of materials from any collection is a formal process conducted by knowledgeable Staff, according to written guidelines, as a necessary means to maintain collection vitality, size and scope.

Should the Library become aware of an item that is the subject of a libel action it will be removed from the collection until the action is resolved when, depending on the outcome of the action, it will be returned to the collection or permanently withdrawn.

Materials that are accessible through a consortium agreement may not be removed if they are outside the control of the Library, and may be subject to the policies of other consortium members.

The Library continually identifies items from its collections for discard based upon the following criteria:

- Currency of the material;
- Interest in and demand for material;
- Overabundance of material or subject as interest changes;
- Condition of copies.

Once an item is identified for possible de-selection based on the above criteria, additional criteria are employed to make a final decision, including, but not limited to, whether:

- It is of local, regional, or national significance, including works of local or Canadian authors, artists, recording artists or film makers, and works pertaining to local history;
- It is a work by a famous author, artist, recording artist, film maker or universally accepted as a classic work;
- It is unique to the collection, in that there is little or no information available on that topic elsewhere, and the information is still relevant and useful;
- It represents a diverse experience and/or point of view and removing it could result in an imbalance in representation of the voices of a generally under-represented group within the local community or wider culture.

Every attempt is made to repurpose those items withdrawn from the collection. Where inclusion in book sales or re-sale to an outside vendor is not possible, material will be discarded through appropriate waste management streams.

French and Other Language Collections

Print materials will be selected for a juvenile French collection that supports the Ontario Curriculum French as a Second Language Grades Kindergarten to 8 and will provide leisure reading materials for children enrolled in French immersion programs up to and including Grade 6.

French language magazines will be purchased for print and electronic collections.

Materials will be selected for other juvenile language collections as deemed relevant based on the evolving demographics and needs of the community.

To meet community demand for multilingual collections, the Library will participate in provincial and/or regional multi-lingual pools where appropriate, and available.

Local History Collection

The Local History Collection has a separate set of criteria as outlined in the current 'Local History Policy'.

Local or Self-Published Authors

The Library wishes to recognize the creative efforts of local residents and includes their materials in the collection where suitable. These materials are subject to the same Selection Criteria outlined above.

In order to be considered for the collection, local authors must submit a copy of the attached form with the work (see Appendix #2).

- The Library only accepts donated material, which can be dropped off at any of the Library's branches or sent by post. The Library does not accept any work in electronic format.
- Once the work has been submitted, the materials are reviewed by the selector responsible for that particular collection (i.e. adult fiction, adult nonfiction, children's) with consideration for the Library's established Selection Criteria (see above).
- The Library is not obligated or able to notify every author of the final decision nor can the Library meet with individuals to discuss their work.
- Materials selected for inclusion into the collection become property of the Library. The Library reserves the right to include or exclude any title from the collection for any reason. Materials donated to the Library may be removed for any reason, at any time.
- The Library is unable to offer promotional services for the material, including but not limited to, marketing, reviews, or any promotions.
- The Library is under no obligation to purchase additional copies. If the Library does choose to acquire more copies, it may do so through a vendor established with the Library and not directly through the author.
- Authors may donate up to three (3) items per year. Only one copy of each work will be accepted.
- Book submissions must be professionally printed and bound. No works with spiral binding will be accepted.

Book Club Collection

The Book Club collection consists of sets of titles for use by the Library's Book Clubs, and clubs throughout Ontario, which are affiliated with a public library. Each set has multiple copies of the same title (usually between 10 and 20 copies).

Book Club collection titles are selected based on input from members of the Library's Book Clubs and in consideration of the selection criteria.

Exclusions from Selection

The Library does not knowingly keep, acquire or purchase material that violates the Criminal Code definitions of "obscene material", "hate propaganda" or "seditious material" as defined by case law interpreting those provisions, including the application of The Canadian Charter of Rights and Freedoms.

No material will be excluded from selection because of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, sex, sexual orientation, gender identity, age, marital status, receipt of public assistance, political affiliation, disability, level of literacy, language and/or socio-economic status.

No materials will be excluded from selection for Library collections solely because they may come into the possession of a child.

Textbooks and curriculum-related works are not purchased unless they are considered useful to the general reader as an introduction to a subject, are the only source of information, or because their content is considered essential to a library collection.

Responsibility for Selection Activities

The overall responsibility for Library collections rests with the CEO. The responsibility for selection of materials is vested in the Collection Development Committee. All Library Staff and customers are able to make recommendations to the Committee through the use of the Purchase Request Form.

Intellectual Freedom

The Library recognizes the right of any individual or group to reject Library material for personal use, but does not accord to any individual or group the right to restrict the freedom of others to make use of that same material.

The Library endorses the "Ontario Library Association Statement on the Intellectual Rights of the Individual" (See *Appendix 1*) and the Ontario Library Association Position on Children's Rights in the Library (See *Appendix 3*). Responsibility for children's use of Library collections rests with their parents or legal guardians.

The Library Board, in establishing this Collection Management Policy, is cognizant of Section 2(b) of the [Canadian Charter of Rights and Freedoms](#) that guarantees everyone the freedom of thought, belief, opinion and expression, including freedom of the press and other media of communication.

Merchandising and Promotion

The Library displays physical materials, including various print formats and media, in all its Branches. The Library also shares information about materials in its Collections through promotions using various communication methods, including the Library's website and social media accounts. Materials are displayed and promoted in order to make customers aware of the range of content available to them, and to make accessing materials easier.

Final responsibility for the display and promotion of Library materials resides with the CEO, and various employees throughout the system share day-to-day responsibility. Materials are selected for display or promotion for a wide variety of reasons, including but not limited to: relation to current events, news, and pop culture; interest and demand for genres and specific types of content; relation to Library programs, services, and organizational goals; cultural, historical, or educational significance.

The Library strives to include a wide spectrum of opinions and viewpoints in Library-initiated displays and promotions, as well as highlight materials that appeal to a range of ages, interests, and information needs. Materials will not be excluded from display or promotion because the specific title/item, creator, topic, or content may be considered controversial.

Requests for Reconsideration

While professional staff are available to discuss the make-up of the collection, the Library is obliged to withdraw only that material judged illegal by the higher courts in Canada.

Requests for Reconsideration will adhere to the following guidelines:

- Requests will only be accepted by residents of Innisfil who are active cardholders.
- Requests must be submitted using the Request for Reconsideration form (Appendix #4).
- The Library will respond in writing within ten business days, and a decision will be made and communicated to the submitter within three months from the date of receipt.
- A given title/item will be reviewed no more than once in a three-year period,

regardless of the number of Reconsideration Requests received by the Library.

- Items will continue to remain available to the public in the Library's collection while under review, except when needed by Staff for the purposes of assessment.
- A maximum of 10 items will be reviewed in a given calendar year, subject to change depending on the level of complexity involved in assessing each item.
- The Library is unable to reconsider specific materials available through third-party vendors.

Non-Endorsement of Content Statement

Selection of an item for a Library collection does not constitute endorsement by the Library of either the content or viewpoint expressed in the item.

Gifts and Donations

Gifts and donations of materials are accepted subject to the Library Board's current Gifts and Donations Policy.

New Formats

Careful consideration is given to the introduction of new formats to the Library's collections. Budget, community needs and the impact on existing resources are all reviewed before items in a new format are considered and introduced into the collection.

To responsibly accommodate trends in user demands and/or changes in technology, the selection of material in any new format may result in the Library's decision to retire specific items or material formats from its collections.

Housing

The Library will maintain its collection as a single entity. Each branch will house a representative selection of the Library's materials, in addition to materials of specific interest to the area served. More in-depth materials will be housed primarily in the largest branch. The depth and breadth of the collections will vary from branch to branch based on community needs. On a temporary basis, some portion(s) of the collection may be placed in storage.

Access

The Innisfil Public Library Board affirms that all persons have the right of access to varied expressions of intellectual activity and creativity in a non-judgmental environment. While recognizing that some of these expressions may be considered "controversial", and that a given item may offend some customers, the Library will not deny access to any Library materials. The ultimate responsibility for choice rests with the customer.

In accordance with the above principle, the Library will not label or shelve "controversial" materials separately from the general collection.

Guidance in the choice of Library materials for children, as well as limitations on use and ongoing monitoring, are the sole responsibility of the child's parent or legal guardian, as outlined in the Library's Children's Services Policy.

The Library will reserve the right to shelve irreplaceable materials, and materials which are essential to daily service, in non-circulating reference areas.

The Library may control use of any collection material in order to protect items deemed susceptible to theft or damage by users or to ensure the widest possible use of materials by Library customers.

Assessment

The collection will be assessed for quality and balance on an on-going basis. Access to retrospective materials will continue through the provincial Interlibrary loan system, when they are available and in accordance with interlibrary loan service parameters.

Resource Sharing

The Innisfil Public Library Board affirms the value of resource sharing within the library community and supports the provincial Interlibrary loan system. Priority for borrowing materials through interlibrary loan will be given to requests of an educational or research nature. The Library will strive to complement the information services of schools, agencies and other organizations within the Town of Innisfil, but will not assume their function. Customers will be referred to appropriate information sources when the Library's collection does not meet their needs.

Appendices

Appendix #1 - Ontario Library Association - Statement on the Intellectual Rights of the Individual

Appendix #2 - Local Author Submission Form

Appendix #3 - Ontario Library Association - Position on Children's Rights in the Library

Appendix #4 - Request for Reconsideration of Library Materials

Related Policies

Local History Policy

Book Club Policy

Children's Services Policy

Youth Services Policy

Supersedes Policy #2021-07, approved March 15, 2021, Motion #2021.28; &
Policy#2017-04, approved February 21, 2017, Motion #2017.17 & Policy #2013-18,
approved November 18, 2013, Motion #2013.102; &
Policy #2010-21, approved November 8, 2010, Motion #2010.74; &
Policy #2007-06, approved October 15, 2007, Motion # 2007.51 &
Policy # 2006-04, approved March 20, 2006, Motion #2006.22 &
Policy #2001-02, approved February 1999, Motion #99.10.

**Ontario Library Association
Statement on Intellectual Freedom and the Intellectual Rights of the
Individual**

Introduction

The Ontario Library Association and its divisions are committed to the fundamental rights of intellectual freedom, the freedom to read and freedom of the press, as embodied in the Canadian Charter of Rights and Freedoms.

Ontario Libraries have the important responsibility to facilitate expressions of knowledge, creativity, ideas, and opinion, even when viewed as unconventional or unpopular.

The Ontario Library Association declares its acceptance of the following principles for libraries:

1. Equitable access to library service to the public is based upon the right of the citizen, under the protection of the law, to judge individually on questions of politics, religion and morality.
2. Intellectual freedom requires freedom to critically examine and create other ideas, opinions, views, and philosophy of life, other than those currently approved by the local community or by society in general and including those ideas and interpretations which may be unconventional, uncommon or unpopular.
3. The free traffic in ideas and opinions is essential to the health and growth of a free society and that the freedom to read, listen, view, and create is fundamental to such free traffic.
4. Library governance ensures that the principles of intellectual freedom and expression of thought are upheld.

Library Service, Collections and Resources:

5. It is the responsibility of libraries to maintain the right of intellectual freedom and to implement it consistently in the selection of books, periodicals, films, recordings, and other materials including the provision of access to electronic sources of information and access to the internet. Materials are not excluded from library collections based on race, place of birth, origin, ethnic origin, ethnicity, citizenship, age, creed, disability, family structure, sex, and sexual orientation.

6. It is part of the library's service to its public to resist any attempt by any individual or group within the community it serves to abrogate, censor or curtail access to information, the freedom to read, view, listen or participate by demanding the removal of, or restrictions to library information sources in any format.

Library Programming, Events, and Space Bookings

7. It is the responsibility of libraries to maintain the right of intellectual freedom and expression by implementing it consistently when hosting programs and events within the public space of the library including rented public space by individuals and community organizations.
8. Libraries create welcoming community spaces where community members are free from discrimination and may engage in peaceful assembly. Libraries may cancel or deny permits to individuals or organizations when speech or displays are used in a way that is unlawful.

Applicable legislation:

[Canadian Charter of Rights and Freedoms](#): Section 2(b) of the *Charter of Rights and Freedoms* protects "freedom of thought, belief, opinion and expression, including freedom of the press and other media of communication".

[Criminal Code](#): Section 63 pertains to Unlawful Assemblies and Riots. Section 297 pertains to defamatory libel. Section 318 pertains to hate propaganda.

[Ontario Human Rights Code](#): Sub-section 13 pertains to infringing on freedom from discrimination.

Revision approved at the OLA AGM, January 30, 2020



Local Author Submission Form

In order for the Library Staff to serve you better, please provide the following information when submitting your work for consideration:

Author Information

First Name: _____ Last Name: _____

Address: _____

Phone Number: _____

Email Address: _____

Author's credentials (mandatory for non-fiction):

Book Information

Title of Book: _____

Vendor/Publisher Information: _____

ISBN: _____

Audience: _____

Fiction/Nonfiction: _____

A **brief** summary of the book's contents:

Information about illustrations (children's books only):

Reviews or links to reviews of your book (if available):

Why this book would be of interest to Innisfil ideaLAB & Library's customers:

To submit your work, you can visit one of our Branches or mail donations to:

Innisfil Public Library
Attn: Collection Services Librarian
967 Innisfil Beach Road
Innisfil, ON
L9S 1V3

**THE ONTARIO LIBRARY ASSOCIATION
POSITION ON
CHILDREN'S RIGHTS IN THE LIBRARY**

Children in public libraries have the right to:

1. Intellectual freedom.
2. Equal access to the full range of services and materials available to other users.
3. A full range of materials, services and programs specifically designed and developed to meet their needs.
4. Adequate funding for collections and services related to population, use and local community needs.
5. A library environment that complements their physical and developmental stages.
6. Trained and knowledgeable staff specializing in children's services.
7. Welcoming, respectful, supportive service from birth through the transition to adult user.
8. An advocate who will speak on their behalf to the library administration, library board, municipal council and community to make people aware of the goals of children's services.
9. Library policies written to include the needs of the child.

Adopted at the Ontario Library Association
Annual General Meeting
November 1998

Source: http://accessola2.com/data/1/rec_docs/380_ola3.pdf



**REQUEST FOR RECONSIDERATION
OF LIBRARY MATERIALS**

Submitter Information

First Name: _____ Last Name: _____

Address: _____

Phone Number: _____

Email Address: _____

Library Card Number: _____

Are you a resident of Innisfil? Circle one: YES NO

Item Information

Author/Creator: _____

Title: _____

ISBN: _____ Call Number: _____

Have you read/viewed the entire item (video, book, etc.)? Circle one: YES NO

(If not, which parts have you reviewed? Include page numbers)

What are your concerns? (Please be specific, include page numbers)

How does the item fail to fulfill the Selection Criteria outline in the Library’s Collection Management Policy?

What do you suggest the Library do about this item?

Have you read the attached Collection Management Policy? Circle one: YES NO

Signature

Date

ADMINISTRATIVE USE ONLY:

Date Received _____

Received by: _____
(Staff Name)

Review undertaken by:

Staff Name: _____

Position: _____

Attach the full written report to this document

Summary of Recommendation:

--

Action Taken:

--

Date of communication of decision to submitter: _____

Staff Member

Date

CEO/Chief Librarian/Designate

Date