

## **City of Burlington Housing Strategy**

### **Terms of Reference**

#### **1. Purpose of the Terms of Reference**

The purpose of the Terms of Reference is to outline the scope of work related to the preparation of a Housing Strategy for the City of Burlington which will include creative and innovative solutions to local housing issues. The Terms of Reference will also outline next steps for implementation of the Housing Strategy and is also intended to clarify roles and responsibilities of the project team, the successful proponent and supporting committees/working groups required for this project.

#### **2. Background and Context**

The Housing Strategy has been identified as an implementation measure arising from the [City's Strategic Plan, Burlington's Plan \(2018 to 2022\) From Vision to Focus](#), as well as the [City's new Official Plan](#).

Citizen engagement undertaken as part of the development of the Strategic Plan highlighted an almost universally held concern about housing costs and lack of housing options for young people, seniors and newcomers within the City. The Strategic Plan highlighted opportunities to diversify housing supply through the development of policies within the new Official Plan, and alongside that work, the Strategic Plan identified the need to prepare a Housing Strategy. Burlington's From Vision to Focus Plan identified the completion of a City Housing Strategy as a top priority during this term of Council.

The City's new Official Plan, which received Regional approval, with modifications in late 2020, made significant changes to the policies of the Plan, primarily by identifying an Urban Structure (Schedule B) and establishing a Growth Framework (Schedule B-1) to identify areas where the City was expecting growth and transition. Both changes had the effect of identifying significant opportunities to redevelop in key areas of the City to accommodate growth, such as around the GO Stations and existing commercial plazas and corridors, and away from established neighbourhoods where only gentle intensification is expected to occur. Residential permissions have existed in these areas previously however over the past several years there had been little uptake in these areas. The new Official Plan identifies the most appropriate locations in the City for intensification to support the provision of a wider range of housing options, jobs, more mobility choices by prioritizing active transportation and transit, and investments in infrastructure and public service facilities to bring residents closer to services, facilities and stores that support daily and weekly living.

#### **3. Purpose of the Housing Strategy**

The principal objective of this project is to develop an innovative Housing Strategy for the City of Burlington that sets out policies, tools and actions to address residents' housing needs now and in the

future. The Housing Strategy will build on and support the Region’s Housing Strategy through the development of local solutions to housing issues in the City of Burlington.

The key outcomes of the City’s Housing Strategy include:

- Understanding the key players and their respective roles in housing;
- Understanding the current state of housing in Burlington and identifying current and future housing needs;
- Establishing a toolbox of best practices in housing, focusing on innovative practices and new, pioneering ideas;
- Developing of a set of action-oriented housing objectives and an associated implementation plan;
- Establishing where the City wants to focus or prioritize efforts to address housing issues in the City

The City does not build housing; however, it does have a role in influencing growth and redevelopment through the development of policy. The City must consider its role in supporting a more diverse range of housing options in a built-up context which comes with a unique set of challenges. The primary challenge is that intensification is largely market driven and can be hard to predict or plan. The incremental nature of intensification can also be a challenge where a clear understanding of cumulative effects of individual development applications can be difficult to determine.

A Housing Strategy provides an opportunity to understand the current state of housing in the City, identify housing needs and to look for innovative solutions through the consideration of a variety of planning policy and financial tools, partnership, collaboration and advocacy opportunities, strategies and initiatives.

The Housing Strategy will include all lands within the City of Burlington, with a focus on the Urban Area, where the majority of growth will be directed.

**4. Project Risks**

<b>Issue</b>	<b>Probability</b>	<b>Consequence</b>	<b>Mitigation</b>	<b>Risk after Mitigation</b>
Changes to Provincial Planning policy, legislation or regulations	Likely	High	Staff will be prepared to assess changes and report on any impact to scope, timing and resources required to complete the work.	High

Expectations of the outcome of the Housing Strategy	Likely	High	The project terms of reference and the engagement plan will clarify project expectations. The project team will continually communicate the project objectives and key outcomes throughout the process.	High
Lack of buy in from community and community partners	Unlikely	High	The engagement plan will be developed to build a mutual understanding of the project objectives and to establish buy in on the scope and approach to engagement and the expected outcomes of the work.	High
Goals and agreed to measures shift	Possible	High	The project terms of reference and engagement plan will clarify project expectations for decision makers. The project team will develop mechanisms to continually communicate goals and measures for success throughout the project.	High
Staff team turnover or project team turnover	Possible	Medium	The Manager of Policy and Community will work with the project team in the case of human resource challenges	Low

			with the staff team or the successful bidder.	
Confusion over the relationship between the City's Housing Strategy and the Region's housing work as Housing Service Provider.	Possible	Medium	The project's engagement plan will be developed to build a clear understanding of the project scope and how it builds on and supports the housing work undertaken at the Region. The project team will develop mechanisms to continually communicate this throughout the project.	Low

## 5. Project Phases and Requirements

The Housing Strategy project has been divided into two phases.

**Phase 1** will be consultant led and will deliver the necessary background information, data, analysis of needs and trends, and insight on municipal best practices as well as an overview of national and international best practices for innovative housing strategies. This information will be the basis for the development of a made in Burlington innovative Housing Strategy which will include a set of city-wide housing objectives supported by recommended action items, each with an associated implementation and monitoring plan, which will be prioritized to assist with implementation.

**Phase 2** involves the implementation of the prioritized set of recommended actions approved by Council in Phase 1.

This Terms of Reference is intended solely to guide the completion of Phase 1 of the project, which has been broken down into a number of sub-phases each with key objectives and requirements which are detailed in the chart below. Please note that while the following details represent City staff's best efforts to identify required project components, potential proponents will be asked to identify any additional components (through their proposal submissions) deemed necessary to satisfy the goal and intent of the Housing Strategy.

## Phase 1A – Housing Background

### Objectives

The goal of this task is to identify who does what in the area of housing; what is the current housing policy framework at each level of government; what are the challenges when it comes to housing and what levers can be used to influence housing choice and affordability.

### Requirements (minimum)

- Provide an outline of the housing continuum in Halton with a description of each component.
- Provide a list of relevant housing terminology (defined)
- Analyze the role of each level of government (Federal to Local Municipalities) as it relates to housing. This should include a discussion on funding and housing initiatives such as the National Housing Strategy and Ontario’s Fair Housing Plan and Community Housing Renewal Strategy. The role of Halton Region as a Housing Service Provider should be explored as well as details regarding [Halton Region’s Comprehensive Housing Strategy](#), [Annual State of Housing Report](#), Halton’s Housing Model, Halton Region Housing Action Team and Halton Community Housing Corporation.
- Examine the role of other housing providers such as not-for-profit organizations – i.e. habitat for humanity, faith-based organizations, cultural organizations, service clubs, seniors’ organizations, etc.
- Examine the role of developers in building a range and mix of housing types including affordable housing.
- Provide an assessment of current provincial, regional, and city housing policies contained within:
  - Provincial policies and plans
  - [Halton Region Official Plan](#) and documents pertaining to the Regional Official Plan Review - including those related to housing mix, affordable housing and assisted housing policies and targets.
  - City of Burlington new Official Plan – policies and targets – with a focus on areas identified for future growth (Schedule B-1: Growth Framework)
- Examine the City’s current Zoning By-law.
- Identify current challenges/gaps in housing such as policy, regulation (zoning), funding, gaps in program delivery, etc.
- Identify current opportunities such as new funding commitments, partnership models, etc.
- Identify potential opportunities – i.e. policies and tools stemming from the Halton Region’s Official Plan Review.

## Phase 1B – State of Housing in Burlington and Housing Needs Assessment

### Objectives

The goal of this task is to understand the current state of housing in Burlington and identify current housing needs and anticipated future housing needs (2051 horizon) within the City. This task is also intended to support the scope of work outlined in Phase 1F regarding the development of a municipal assessment report, required for implementation of Inclusionary Zoning.

### Requirements (minimum)

#### Data

- Provide data on the current inventory of housing options in the City. This should include but not be limited to:
  - Data on current housing units by structure type, tenure, age, size (multi-unit developments), etc.
  - Data on current housing along the continuum, including but not be limited to purpose built rental buildings/units (municipal and private), co-op buildings, seniors' residences, group homes, Long Term Care facilities, additional residential units, gardens suites, etc.
  - Housing units within the development pipeline (type, tenure, size, etc.)
- Provide data on current housing costs by type, tenure, location, new vs resale, etc.
- Provide data on the number of short-term rentals in the City
- Provide data on housing sales and rental activity (vacancy rates, etc.)

#### Achieving Targets, Partnerships, Tools and Initiatives

- Provide an assessment on how well the city is achieving Regional housing targets (refer to Halton Region's latest State of Housing Report)
- Identify current City housing partnerships
- Identify current tools used by the City related to housing - i.e. DC incentives Section 37 Agreements, etc.
- Identify strategic City initiatives related to housing – i.e. Burlington Lands Partnership, etc.

#### Future Housing Needs

- Undertake an analysis of demographics and population in the City informed by both the [City's growth analysis work](#) (2041 horizon) and the work being undertaken by Halton Region through their [Integrated Growth Management Strategy](#) (2051 horizon)
- Undertake an analysis of households in the City including size, type, household incomes, proportion of households in core housing needs, and number of households on waiting list for subsidized housing.
- Undertake an assessment of future population and household growth anticipated for the City; guided by the work being undertaken by Halton Region.

### Housing Needs Assessment

- Based on the data and analysis above, identify current and future housing needs for the City. This should also include a discussion of any mismatch between current housing and future housing needs.
- The section should also include a high-level discussion of the range of opportunities related to the outcomes of this sub phase.

### **Phase 1C – Housing Trends Analysis**

#### Objectives

The goal of this task is to understand current Housing Trends within the City, Region and GTHA and the identification of opportunities related to those trends.

#### Requirements (minimum)

- The Housing Trends Analysis should include but not be limited to:
  - Housing type – this should explore all housing types including additional residential units, tiny homes, modular homes, etc. An analysis of unit sizes and number of bedrooms within multi-residential buildings should also be included.
  - Housing forms and arrangements – this should explore affordable housing, special needs housing, rental housing (purpose built and privately owned), co-op housing, life lease housing, co-ownership housing, community land trusts, and land lease community homes, etc.
  - Focus on specific groups such as youth, young families, newcomers, seniors, those in need of special needs housing and workforce housing.  
Multi-generational and multi-family households should also be discussed.
  - The impacts of short term rentals on the rental housing supply
- The Housing Trends Analysis should also include a high-level discussion of the range of opportunities related to the identified trends.

### **Phase 1D – Best Practice Scan/Innovative Practices**

#### Objectives

The goal of this task is to explore what municipal, national and international organizations are doing to address housing needs and affordability and identify innovative tools, practices, programs and initiatives, which focus on the range of opportunities identified in the housing trends analysis.

#### Requirements (minimum)

The best practice scan should include but not be limited to the following:

- **Policies**

- Housing Targets and Measures - for housing mix, tenure, affordable and assisted housing, and two and three bedroom units (family sized) in townhouses and multi-residential buildings
- Rental Housing - rental housing protection policies and increasing the supply of rental housing through Additional Residential Units, laneway housing, garden suites; short term rentals housing, etc.
- Affordable, Assisted and Special Needs Housing – Inclusionary Zoning, prioritizing planning approvals, any requirements for a mix of units with market units, secondary plan policies etc.
- Housing Types, Forms and Arrangements - tiny homes, modular homes, flex homes, life lease housing, co-ownership housing, co-operative housing, community land trusts, land lease community homes, home share programs, housing hubs, etc.
- Municipal Strategies – focused on specific groups (seniors, newcomers, etc.) or focused on specific housing forms such as the missing middle, etc.
- Development Standards – beyond building code such as energy efficiency, etc.
- Tracking/Monitoring – housing supply and need

- **Implementation (tools/incentives)**

- Rental housing protection Bylaws (Municipal Act), Short Term Rental Bylaws
- Municipal Capital Facility tool (Municipal Act)
- Inclusionary Zoning Bylaws
- Community Planning Permit System
- Section 37 /Community Benefits Charges – Housing Reserve Funds
- Community Improvement Plans focused on housing/affordable housing
- Financial Tools – e.g. property tax reductions, waiving or reduction of application fees
- Cost analysis of incentives
- Affordability in perpetuity and range of affordability periods (agreements)
- Housing first for public lands including surplus lands (acquisition, leasing and disposal of property), in coordination with other capital infrastructure projects
- Housing support function – Municipal Development Corporation/Lands Partnership; Regional and Local housing offices
- Licensing/Registration
- Monitoring/Tracking

- **Partnerships & Advocacy**

- Partnership opportunities with upper-tier municipalities, developers and housing providers
- Outreach – Housing Advisory Committee/Task Force



- Funding Advocacy with upper levels of government

## **Phase 1E - Development of a City of Burlington Housing Strategy**

### Objective

The goal of this task is to develop an innovative Housing Strategy for the City of Burlington, based on the findings of the work completed in the previous sub-phases and feedback received from the community, which achieves the support of Council, staff and the residents of Burlington.

### Requirements

The City of Burlington Housing Strategy is to be comprised of:

- A set of housing objectives
- A series of recommendations on policy directions, programs, initiatives, partnerships, advocacy opportunities, tools and strategies to achieve the housing objectives. At a minimum this should include:
  - Policies
    - The establishment of minimum targets for housing mix and affordable and assisted housing, in support of the Region's targets;
    - The establishment of minimum targets for affordable, assisted and or special needs housing within mid-rise and tall buildings; and
    - The establishment of minimum targets for two and three bedroom units for development applications, including minimum targets for three or more bedroom units
  - Examination of potential strategies including but not limited to Seniors Housing and Long Term Care Facilities
  - Connections with the Burlington Lands Partnership
    - Identification of strategic opportunities to focus on the delivery of affordable housing;
    - Identification of city resources required to support this work; and
    - Recommended 5-year goals and/or targets related to affordable housing
  - Connections with any other initiatives/opportunities that may emerge
- A recommended prioritized list of recommended actions and a plan to support the implementation of each. At a minimum this should include who would manage/be responsible for the implementation, what is the process required to achieve implementation, what resources would be required, monitoring tools to measure success, etc.
- The prioritization of the list of recommendations shall identify any quick wins and will support the work to be undertaken in Phase 2 of the Housing Strategy project.

## Phase 1F – Inclusionary Zoning Municipal Assessment Report

### Objective

The goal of this task is to prepare a Municipal Assessment Report in collaboration with the Region of Halton which meets the requirements of the Inclusionary Zoning Regulation under the Planning Act.

### Requirements

The Municipal Assessment Report, required for implementation of Inclusionary Zoning, should be developed using information and data from the Housing Strategy project and any additional data required to meet the report requirements, including but not limited to data on value of land, cost of construction, market price and rent as well as housing demand and supply.

The scope of work and any detailed workplan must be confirmed with Halton Region to ensure alignment with any Inclusionary Zoning work being undertaken by Halton Region.

### **Key Deliverables:**

1. Project Team Communications and Responsibilities Plan
2. Engagement Plan (to be prepared by staff)
3. Housing Background memo (Phase 1A)
4. State of Housing in Burlington and Housing Needs Assessment memo (Phase 1B)
5. Housing Trends Analysis memo (Phase 1C)
6. Best Practice Scan / Innovative Practices memo (Phase 1D)
7. **Interim Project Report** addressing items 3,4, 5, and 6 and preliminary City housing objectives, set of recommendations and actions plans to support implementation for public engagement and Council consideration
8. Housing Strategy – City housing objectives, set of recommendations and actions plans to support implementation (Phase 1E)
9. **Final Project Report** addressing items 3,4,5,6 and 8
10. Inclusionary Zoning Municipal Assessment Report (Phase 1F)

## **6. Project Organization and Additional Requirements**

### Project Management

The City's Housing Strategy is to be managed by a Planning Policy Team Member who will be accountable to the Manager of Policy and Community and to the Housing Strategy Steering Committee. The work for Phase 1 of the project, as described in this Terms of Reference, will be

undertaken by the successful proponent, with the assistance of staff from Planning Policy and other City staff, as required.

To support the delivery of a City Housing Strategy as outlined in these Terms of Reference, a comprehensive Engagement Plan will be developed by City staff in consultation with Council, the project Steering Committee and project Working Group, the successful proponent, the City's ChAT Team and other stakeholders. This will include the identification of any other committees that may be required.

#### Housing Strategy Steering Committee

A Housing Strategy Steering Committee will be established to give strategic advice on matters related to this project. The work of the Steering Committee will be guided by a Committee Terms of Reference to be developed at the time of the preparation of the Engagement Plan. The Steering Committee will be made up of the following city staff, or their delegate.

- City Manager
- Director of Corporate Communications and Government Relations
- Executive Director of Community Planning, Regulation and Mobility
- Director of Community Planning
- CBO/Director of Building & Bylaw
- City Solicitor/Assistant City Solicitor
- Director of Finance (CFO)
- Director of Capital Works
- Executive Director, BEDC

It is expected that the Steering Committee will meet as follows:

- At project initiation to review the detailed workplan;
- To provide comments and approve the Engagement Plan; and
- To review key deliverables, as required.

Furthermore, the committee will be consulted on an as-needed basis should additional issues arise that have not been anticipated by the Terms of Reference.

#### Housing Strategy Working Group

In support of these Terms of Reference and the overall development of a made in Burlington Housing Strategy, a Housing Strategy working group will be established with a maximum membership of 20 people with volunteers from a variety of sectors including government, not for profit, co-op, the business community as well as residents working together to support the development of the Housing Strategy. Additionally, the working group will include the Mayor and at least one additional member of

Council. The group will advise on local issues, be champions for the project, provide key insights given their diverse backgrounds, and will contribute to the refinement and implementation of the communications and engagement plan. The Housing Strategy Working Group mandate will be described in a Terms of Reference to be developed at the time of the preparation of the Engagement Plan. The Housing Strategy Working Group should have membership including representatives from the following:

- Federal and Provincial elected officials or their delegates
- Members of Council
- Region of Halton Staff
- Ministry of Municipal Affairs and Housing Staff
- Not-for-profit and Co-op Housing Sector
- Building and Development Sector
- Realtors Association of Hamilton and Burlington
- Residents

It is expected that the Housing Strategy Working Group will meet as follows:

- At project initiation to go over the project workplan;
- To pre-engage on the development of the staff-led Engagement Plan, and provide comments on the draft Engagement Plan; and
- To review key deliverables, as required.

#### Project Team responsibilities

The project team will be made up of City Planning Staff (Policy) and the successful proponent. The division of responsibilities from the perspective of the City's Planning Staff and the successful proponent's team are described generally below. It will be the responsibility of the City's Planning Staff, in consultation with the successful proponent's team to confirm these responsibilities and to confirm associated timelines beyond those generally described in Section 5.

The City's Planning Staff are responsible for:

- Project management;
- Ensuring linkages between the Terms of Reference and the project work;
- Providing background information and the assembly of necessary data, reports, contacts, etc. to the successful proponent;
- Ensuring alignment and connections between the Housing Strategy and other city initiatives;
- Providing knowledge and support to the successful proponent as well as establishing and managing data sharing requirements and appropriate agreements;
- Preparing and implementing the detailed Engagement Plan;

- Leading and coordinating communication between the City, the successful proponent and their consortium, partner agencies, stakeholders and the community;
- Coordinating, preparing and facilitating community and stakeholder engagement initiatives;
- Monitoring, reviewing and providing feedback and/or revisions on the work of the successful proponent;
- Preparing a minimum of two staff reports to City Council based on the work of the successful proponent;
- Analyzing, consolidating and responding to public comments/feedback, in consultation with the successful proponent;
- Coordinating and engaging with Steering Committee and Housing Strategy Working Group.

#### The successful Proponent's Team Responsibilities:

- Coordinating the consulting team;
- Project management support;
- Ensuring regular communications with the City's project manager, based on an agreed to communications plan at the outset of the project;
- Ensuring linkages between the Terms of Reference and project work, attend and provide support at project committee meetings (as required), public engagement events and at City Committee/Council meetings;
- Providing feedback on the project's Engagement Plan (developed by City staff)
- Delivering of the project deliverables as outlined in Section 5.0;
- Scheduling and attending regular check-in meetings to discuss progress and identify challenges or issues in a timely manner;
- Maintaining project budget and regular monitoring and reporting of hours billed directly, broken down by the project's key tasks/deliverables on a monthly basis; and
- Preparing detailed invoices broken down by tasks and work completed, in alignment with the project budget.

#### Project meetings

Meetings between the City's project lead and the successful proponent will take place, as required and specified in the Communication and Responsibilities Plan. Check-ins between the City's project lead, and the successful proponent will be required, and it is expected that regular email correspondence will occur throughout the project. Larger team meetings, including the attendance of additional successful proponent's team members, will be scheduled as required. Staff will be responsible for leading, coordinating and facilitating all meetings.

### Consultation and Engagement

Staff will develop a comprehensive Engagement Plan as well as coordinate, prepare for, facilitate and present at public and stakeholder meetings and consultation events with supporting presentations from the successful proponent, as required. The successful proponent, including other consulting team members as required, may be asked to be present and to present for a portion of each meeting as well as assist in answering questions and other tasks as required.

The successful proponent must be available for additional public and stakeholder meetings and consultation events as required. It is also expected that the successful proponent will provide a continued public presence throughout the process.

### Committee/Council meetings

It is anticipated that there will be, at minimum, two Committee/Council meetings where the successful proponent including any consulting team members (as required), will be required to attend and assist City staff in presenting and answering any questions. Attendance at additional Committee/Council meetings may be required, as needed.

### Agency and Stakeholder meetings

Staff will facilitate meetings with key stakeholders identified through the project. The successful proponent, and other consulting team members (as needed), may be required to attend such meetings as deemed necessary.

### Procurement Process

These Terms of Reference including any recommended refinements and any relevant additional details, will proceed through a formal Request for Proposal (RFP) process as soon as possible.