



Presentation to

**Planning, Environment,  
Resources and Land Deputies  
Committee (PERL)**

with the

**Ontario Business Improvement  
Area Association (OBIAA)**

March 2017



## SECTION ONE

# INTRODUCTION







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### BACKGROUND ON THE ONTARIO BUSINESS IMPROVEMENT AREA ASSOCIATION

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OBIAA strives to be a catalyst for positive community and economic change, enabling growth in Ontario BIAs. Formed in 2001, OBIAA has focused on building the capacity of our BIAs through advocacy, networking and education.

OBIAA's 2016 membership boasts a combined BIA levy exceeding **\$68,000,000**, with almost **100%** being invested back into keeping Ontario's communities vital. There are almost **83,000** businesses and property owners that are represented within Ontario's more than **300** BIAs. In 2016, **232** BIAs were members of OBIAA, approximately 75% of all BIAs in the province.

BIA Boards collectively employ more than **130** part-time staff, approximately **175** full-time staff. Further our volunteer Boards of Directors donate their time to build their local Communities. A conservative estimate puts the number of volunteers in excess of 3,000, with a combined 60,000 volunteer hours.

The Ontario Business Improvement Area Association (OBIAA) Board of Directors works closely with liaison representatives from the Ministry of Municipal Affairs and Housing (MMAH), the Ministry of Agriculture, Food and Rural Affairs (OMAFRA), the Ministry of Economic Development and Growth (MEDG) and the Ministry of Tourism, Culture and Sport (MTCS). The Board welcomes these liaisons as invaluable members to enhance sharing and understanding the concerns of local business in our BIAs across Ontario.

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### THE STATE OF MAIN STREET ONTARIO

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RESILIENCE...this is a word that embodies Ontario's main streets, downtowns and uptowns. No matter what you call them; Ontario's history is based on the formation of towns, cities and villages who all have a central business district. These areas have survived and thrived through many industry changes, from the early day mills...lumber, grist and wool, to mining and manufacturing. Our downtowns have continued to be the backbone of our economy. The time is now to support, educate, communicate and invest back into our BIAs.

Business Improvement Areas, in most cases, represent 'Main Street Ontario', the economic backbone of the province. In the 1950's and 1960's planning departments in municipalities across the province were encouraging the growth of regional malls. As growth in strip malls, regional malls and suburbs developed in the 1950's and 1960's interests moved away from the traditional main street. As a result the heart of our communities began to crumble. Several leaders of the main street community approached the province and the *innovative, cutting edge* and supportive BIA legislation was added to the Municipal Act.

Through the BIA legislation, property owners and their tenants come together to create vibrant community cores. By providing the tools to position themselves for the new economy, BIAs continue to adapt themselves to the changing world, including digital marketing and other challenges and opportunities.

Working together, alongside and at the table with our Provincial Deputy Ministries encourages understanding and recognition of the paradigms facing 'Main Street' Ontario.

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### BACKGROUND ON BUSINESS IMPROVEMENT AREAS (BIAs)

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The first BIA legislation, in the world, was created in 1970 in a partnership with the Ministry of Municipal Affairs and Housing (MMAH), Bloor West Village and the City of Toronto. This legislation builds partnerships between the municipalities and the businesses in that community.

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In the 2010 Ministry of Municipal Affairs and Housing's [BIA Handbook](#) it states:

*Once a traditional BIA is approved by municipal council, businesses within its boundaries become members and pay the BIA levy along with their property taxes. A traditional BIA view is that this structure reflects the principle that all who benefit should be required to bear their fair share of the cost of the program. In addition, the arrangement provides a secure source of funding for BIA activities.*

BIAs are deemed a local board of a municipal council and are required to follow the provisions in the Municipal Act, 2001 that pertains to local boards. BIAs also have specific sections in the Municipal Act, 2001 pertaining only to these municipal organizations. While it is unfortunate there is no mandatory mechanism for tracking the BIAs formed by the municipality in Ontario, OBIAA has a current database of more than 300 BIAs in the province of Ontario.

This forward thinking Legislation has been utilized and modified by other governments to create BIA type organizations all over the world. BIAs, BIDs (districts) and BIZs (zones) are all successful off-springs of Ontario's original legislation.

## OBIAA'S 2016-2019 STRATEGIC PLAN

**Vision Statement:** OBIAA is renowned and respected across Ontario and beyond, as a dynamic and sustainable, highly-functioning organization, providing leadership, advocacy and world-class resources. OBIAA is a catalyst for positive community and economic change, enabling growth in Ontario BIAs.

**Mission Statement:** OBIAA is the network that represents unique and vibrant BIAs across Ontario. It supports and advocates on behalf of its members through the building and nurturing of strong relationships and partnerships.

2016 TO 2019 STRATEGIC PRIORITIES	
Strategic Objective	Strategic Objective Statements
Advocacy	Identify and represent common issues affecting BIAs to all levels of government and be recognized by all as the 'go to' organization.
Communications	Create awareness of the importance of BIAs and increase the awareness of the organization by internal and external communications through a clear, well-defined strategy(ies).
Education	Increase the capacity of individuals and key stakeholders by providing continuous professional resources through best practices and training.
Governance	Be exemplary in setting the standard and best practices as an organization.

## OPENING REMARKS

This annual opportunity to address the PERL Deputy Ministers, and through the working relationships we have with our ministry liaisons at our Board of Directors table, our board and membership are excited by the positive results related to these issues, such as:

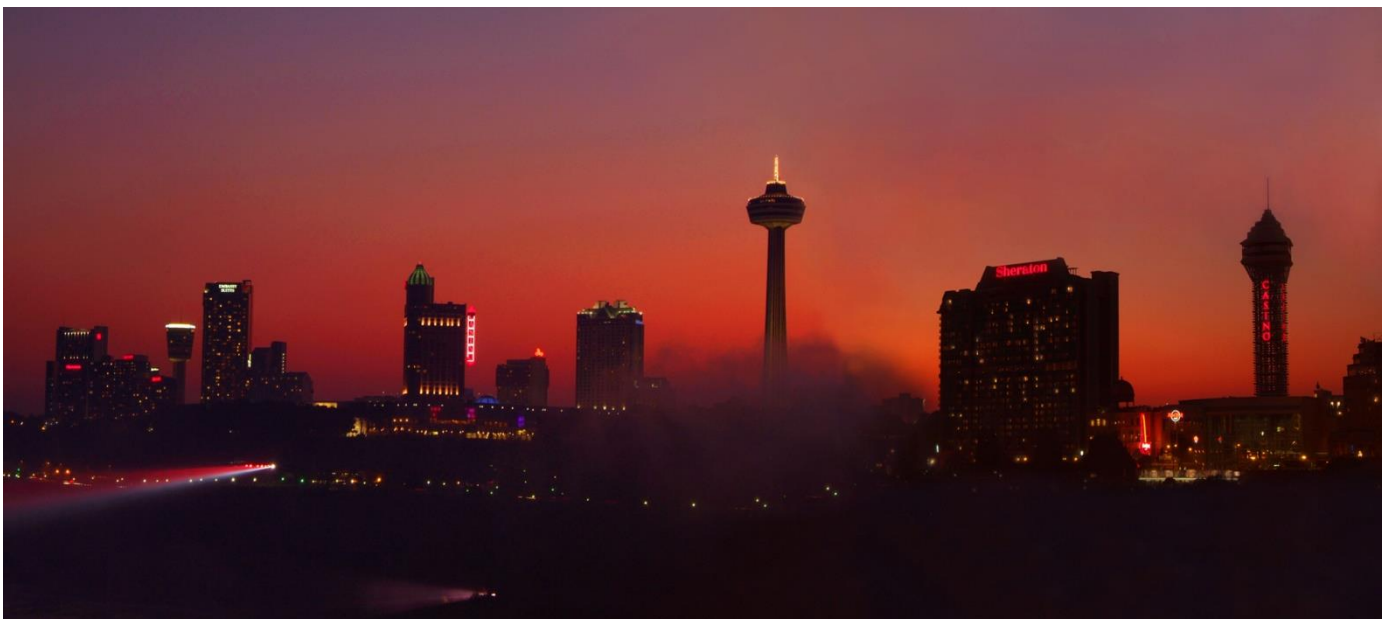
- ♦ **Return on Investment of BIAs Project:** Funded by a provincial transfer payment agreement, this initiative is providing us with vital information which identifies data to support the value and return on investment of BIAs, while identifying key data gaps for future efforts.
- ♦ **Vacant Unit Rebate:** OBIAA participated in a stakeholder consultation on Business Tax Capping and Vacancy Rebates. The outcome of which resulted in legislative change and options for municipalities related to vacancy rebates.
- ♦ **AODA:** Working with the Accessibility Directorate to be a successful applicant for two EnAbling Change grants that allowed us to advance accessibility education, understanding and improve compliance in small businesses in BIAs.

These accomplishments reinforce the value this annual dialogue has for furthering our relationship, identifying issues and working collaboratively to make progress or understand barriers. *Thank you again for this opportunity.*



## SECTION TWO

# OBIAA 2017 PRIORITIES





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### 2017 PRIORITIES

The Board of Directors of the Ontario BIA Association are grateful to have the opportunity to represent the BIAs and the members of the individual BIAs to this PERL Deputy Ministers' meeting. We have achieved so much this past year, on behalf of BIAs and OBIAA's membership. While we still have concerns with issues previously presented and discussed, we thank you for this continued opportunity to dialogue. Below are the items we bring to the table for discussion this year:

#### 2017 PRIORITY 1: MUNICIPAL ACT

#### 2017 PRIORITY 2: VACANT UNIT REBATE

#### 2017 PRIORITY 3: ACCESSIBILITY

#### PARTNERSHIP OPPORTUNITIES:

- ♦ Red Tape Taskforce
  - ♦ Return on Investment on BIAs – Project Analysis
  - ♦ Return on Investment on BIAs – Next Steps
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### 2017 PERL PRIORITIES: MUNICIPAL ACT

Issues:	Challenges:	Possible Solutions:
<p>In October 2015, OBIAA submitted a positioning paper regarding the Municipal Act Review that was underway. We took the opportunity to present our recommendations to the PERL Deputy Ministers' Committee in 2015 to gain insight and understanding in order to garner support and inform our recommendations.</p> <p>Three areas of importance to our BIAs, they are:</p> <ol style="list-style-type: none"> <li>1. Definition of BIAs</li> <li>2. BIAs as Local Boards</li> <li>3. Interpretation of the Municipal Act (204-216)</li> </ol>	<p>In defining the challenges with the Municipal Act, we broke the Municipal Act into three areas which we determined create the greatest challenges:</p> <ol style="list-style-type: none"> <li>1. <b>Definition of BIAs</b> The Municipal Act gives BIAs an incomplete definition and BIAs are hampered by this definition. OBIAA believes that a clearer statement of our mission, one that reflects what organizations across the province are actually working on, is appropriate at this time. BIAs have been in Ontario since 1970, and in that time have evolved and developed. It is now recognized that, in addition to promoting business and shopping, they play an important role in: <ul style="list-style-type: none"> <li>• economic development</li> <li>• community and place-making</li> <li>• living space</li> <li>• attracting tourists</li> <li>• employment hubs</li> </ul> </li> <li>2. <b>BIAs as Local Boards</b> As it currently stands, the Municipal Act creates some confusion about BIAs as they are incorporated in the Municipal Act and are considered to be Local Boards of Council. This continues to create confusion as, unlike other Boards, BIAs are self-funded, created by a unique process, and usually have staff who are not municipal employees.</li> </ol> <p>Further Challenges:</p> <ul style="list-style-type: none"> <li>• Disqualification of BIAs from many funding resources</li> <li>• Understanding of which taxes or publicly administered programs apply</li> <li>• Memorandums of Understanding (MOU) between Municipalities and BIAs</li> </ul>	<ol style="list-style-type: none"> <li>1. <b>Definition of BIAs</b> We ask that definition of a BIA be expanded and amended to include 204. (1) (b) as follows: to promote the area as: <ul style="list-style-type: none"> <li>• economic development</li> <li>• community and place-making</li> <li>• living space</li> <li>• attracting tourists</li> <li>• employment hubs</li> </ul> </li> <li>2. <b>BIAs as Local Boards</b> A clear statement on the ways in which BIAs differ (diverge) from other local boards.</li> <li>3. <b>Interpretation of the Act</b> A clear statement that Section 216 does apply to BIAs, suggested wording change would then be 216. (1) Without limiting sections 9, 10 and 11, those sections authorize a municipality to dissolve or change a local board, <i>including BIAs</i>. 2006, c. 32, Sched. A, s. 90.</li> </ol>

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	<p><b>3. Interpretation of the Act</b> There are parts of the MA that are confusing, contradictory, vague and inconsistently applied by Municipalities. As an example Section 214 indicates one way that BIAs are dissolved, where Section 216 indicates another.</p> <p>In this example, Section 216 it is not clear that both apply:</p>	
<p>214. (1) Upon the repeal of a by-law under subsection 204 (1), the board of management is dissolved and the assets and liabilities of the board become the assets and liabilities of the municipality. 2001, c. 25, s. 214 (1).</p>	<p><b>VS/OR?</b></p>	<p><b>DISSOLUTION AND CHANGE OF LOCAL BOARDS</b> Power to dissolve or change local boards 216. (1) Without limiting sections 9, 10 and 11, those sections authorize a municipality to dissolve or change a local board. 2006, c. 32, Sched. A, s. 90.</p>
<p><b>Results</b></p>		
<p>The Ministry of Municipal Affairs released their changes to the Municipal Act in the fall of 2016. No changes were included in the Municipal Act Review pertaining to Sections 204 to 216 which provides oversight to BIAs.</p>		
<p><b>Outcome/Ramifications</b></p>		
<p>Given that no changes were made to the Municipal Act pertaining to BIAs (Sections 204-216), there have been no updates, revisions or changes to the above-noted challenges. BIAs, through our submission, had an opportunity to strengthen and clarify their role in their municipalities and communities, therefore creating full understanding of their structure/role.</p>		
<p><b>Possible Solutions</b></p>		
<p>OBIAA understands the status quo has caused confusion for clerks, councils and BIA boards of management. The Return on Investment project has proved that BIAs <i>are</i> playing a role in street appeal, economic development, supporting local business and community building and therefore they require support, partnerships and policy changes and/or clarifications. With the Municipal Act review behind us, another election year approaches and a further 5 years before another review is considered. <b>What advice or interim recommendations could the PERL Deputy Ministers provide?</b></p> <p>There are two possible scenarios to partner with like organizations (AMO, AMCTO) and the Province to develop one of two strategies in the interim, they are:</p> <ul style="list-style-type: none"> <li>♦ To develop case studies and best practices which provide Clerks, Councils and BIA Boards of Management some possible solutions and/or direction that provides scenarios they could choose to follow.</li> </ul> <p style="text-align: center;"><i>OR</i></p> <ul style="list-style-type: none"> <li>♦ To seek a legal standing on the status of a BIA as a local board, therefore resulting in clarity for Clerks, Council and BIA Board of Management.</li> </ul>		



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### 2017 PERL PRIORITIES ASSESSMENT: VACANT UNIT REBATE

Issues:	Challenges:	Possible Solutions:
<p>Assessment is arguably one, if not, the most critical component of a BIA.</p> <p>It is the foundation and essence of who we are as a BIA. It is the main ingredient of our 'downtown product development'; our bricks and mortar. This allows us to create a market-ready product; which is the great Downtown businesses and public spaces that make up our urban and rural centres.</p> <p>It is the means by which we determine how well we are doing and how and where we need to improve. It is very important to understand, in depth and detail, the elements that directly impact our assessment, and second; measure the impacts associated with those elements and third; make the appropriate decisions to move forward.</p> <p>Assessment anchors our self-levy funding process. Years ago at the initial development of a BIA, many different sources of funding were considered. It was determined that the best way to establish consistency and reliability was to connect our funding model to the commercial assessment through the Municipal property tax process as a special levy. It is so important that it is a mandatory and a non-negotiable element of creating a BIA.</p> <p>Assessment is a complex and broad topic. It has many different elements to consider that can have a profound effect on a BIA's operation and ultimate success. The following related issues, as identified by local BIA Boards and/or their members, are considered very important:</p> <ol style="list-style-type: none"> <li>1. Vacant Unit Rebate</li> <li>2. Municipal Property Assessment Corporation (MPAC)</li> <li>3. Business Education TAX (BET)</li> </ol>	<ul style="list-style-type: none"> <li>• Vacant and deteriorating buildings deter from the beautification of a Downtown and promotes the 'broken-window theory'; which can result in a decrease in the marketable lease rates or the overall 'lease-ability' of a BIA area.</li> <li>• Contradicting strategies between BIAs and Provincial vacancy rebate: BIAs build programs and invest funds to promote vacant property to prospective lessees and focus on achieving full occupancy, whereas the provincial incentives assist property owners with remaining vacant.</li> <li>• Once a property owner is accepted, to our knowledge there is no mechanism in place to ensure that the property owner is actively seeking tenant occupancy.</li> <li>• Property owners purchasing property for purely financial reasons (tax write offs) and not for positive investment.</li> <li>• This is a challenge for both large and small Downtowns</li> </ul>	<p>OBIAA identified an Attraction Rebate as a possible solution in 2014. MMAH asked OBIAA how an 'Attraction Rebate' could be implemented. This year we are presenting an overview of a new class which would provide relief to our main streets, without impacting the office towers of our urban centres. The Attraction Rebate would include a declining rebate over four years as well as stricter guidelines to be used as a tool by Municipalities.</p> <p>Regarding the Vacant Unit Rebate, there are examples of rebates being tied to property standards, such as the case in the Town of Collingwood's Heritage Tax Relief<sup>1</sup>. In this example the Town of Collingwood holds an annual inspection to determine the work required for compliance with the Heritage Preservations and Maintenance Agreement and if it is found that the owner is not in compliance with the Heritage Preservation and Maintenance Agreement, the Heritage Tax Refund will not be granted. This is a living example of the MTCS's Heritage Property Tax Relief<sup>2</sup>. We would like to underscore that just because a building is not designated or listed, if it is heritage in nature its placement in the street may impact the heritage integrity of the whole area, which in many cases gives the area its unique identity.</p> <p>Clearly assessment continues to be problematic to OBIAA and its business and property owner members. Recently OBIAA, participated in <u>Business</u></p>

<sup>1</sup> <http://www.heritagecollingwood.com/heritage-tax-refund/>

<sup>2</sup> <http://www.mtc.gov.on.ca/en/publications/taxguide-e.pdf>

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4. Government Building Exemptions		<u>Reference Group for Property Tax</u> meetings to discuss the Vacant Unit Rebate and other concerns. Through participation OBIAA has gained insight which has informed our 'possible solutions' to this priority.
<b>Attraction Rebate for Main Street Class:</b> (non-office towers) <ul style="list-style-type: none"><li>• Year One - 100% of the 30% or 35%</li><li>• Year Two - 50 % of the 30% or 35%</li><li>• Year Three - 25 % of the 30% or 35%</li><li>• Year Four - 0% of the 30% or 35%</li></ul>		<b>Attraction Guidelines for Main Street Class:</b> (non-office towers) <ul style="list-style-type: none"><li>• Property Standards as set by the Municipalities. Validation of state of the building(s)</li><li>• Market Value Rental Value as set by the local marketplace</li><li>• Education of local Economic Development Tools stimulus, as provided by the Municipalities (CIPs, Heritage etc.).</li><li>• Pop Up vs Incubator – to allow a property owner to have either of these without losing the Vacant Unit Rebate.</li></ul>
<u>Results</u>		
<p>The Ministry of Finance is now moving forward with providing municipalities' broad flexibility for 2017 and future years. This change was announced in November 2016 and is intended to allow municipalities to tailor the vacant rebate and reduction programs to reflect community needs and circumstances. Municipalities will be required to submit a response to a Ministry of Finance Checklist and a Council Resolution indicating how they will be implementing the changes to the Vacant Rebate and Reduction Programs. OBIAA supports these updated changes and has, in response to the checklist provided to Municipalities, decided to provide responses in this report to echo the questions asked on the checklist.</p> <p>OBIAA has been consulting and engaging the business community since 2014 on the Vacant Unit Rebate issue. We have held discussions and/or communicated with the Ministry of Finance, our BIA members and Municipalities. We have reported on these consultations to the province through our submissions to Open For Business and previous PERL submissions.</p> <p>OBIAA has worked through various communication channels to encourage dialogue regarding the Vacant Unit Rebate. These include, but are not limited to: internal communications, various speaking engagements, surveys, OBIAA newsletters, OBIAA/OMAFRA Community of Practices meetings around the province, webinars, OBIAA's AGMs, Annual BIA National Conference (and other conferences attended), Ministry of Finance meetings (4 to date) as well as emails from BIA members and municipalities.</p> <p>The meetings with the Ministry of Finance have brought a number of stakeholders together from Municipalities and property owners and major property developers. These discussions, and discussions we have held with our BIAs, encouraged us to request that the Vacant Unit Rebate only affect at the "main street level" and not the office towers.</p> <p>With the consultation that we have undertaken, we are proposing that instead of a Vacant Unit Rebate, this become an economic development tool for local communities, calling it an "Attraction Rebate" (see above chart). We have spoken with many BIAs and Municipalities and, through consultation, developed an outline for this program as a tool, which would include receiving a rebate only if specifically defined property standards were upheld and even then only for a limited number of years. It was felt vacancies, where no property standards were in effect, are a disincentive to lease and that if the Vacant Unit Rebate could be applied as a tool to leverage property standards that properties that are vacant would/could be moved from a 'derelict' look to one where there was a prospect of rental. The ability to receive a 30% rebate on taxes (and BIA levy) has been shown to allow derelict properties to flourish and have a</p>		

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negative effect on surrounding properties – a spiraling downward trend that is disturbing to our main streets.

Finally, we see this tool as a way to provide financial support to the BIA area. As it stands now, the vacant land under the Vacant Unit Rebate receives up to a 30% rebate. If the “Attraction Rebate” was put into practice as an Economic Development Tool, once the rebate is removed, the 30% gain by the municipality and the BIA could be put back into the community to aid revitalization efforts. When a BIA creates its budget and one property receives a 30% rebate, the levy requirements of the BIA Assessment must be placed onto the other properties. Removing the Vacant Unit rebate would, therefore, allow for a fairer, more equitable distribution of the levy.

In the sample below, you see that in the Vacant Land Class, the BIA only receives \$6,662 and if the Vacant Unit Rebate was not available, the BIA would receive \$8,660; a difference of almost \$2,000 that other tenanted properties, within the BIA, are presently paying.

**Amount to levy:      \$      1,156,105**

Class	RTC	RTQ	Total	Ratio	Vacancy Factor	Rate	Levy
Commercial - Payment in Lieu - Federal	C	F	10,832,000	1.98	1.00	0.00293488	\$ 31,791
Commercial - Payment in Lieu - Province	C	G	2,023,000	1.98	1.00	0.00293488	\$ 5,937
Commercial, taxable at full rate	C	T	285,428,448	1.98	1.00	0.00293488	\$ 837,698
Excess Land, taxable at excess land rate	C	U	1,055,937	1.98	0.70	0.00205442	\$ 2,169
<b>Vacant Land, taxable at vacant land rate</b>	<b>C</b>	<b>X</b>	<b>3,242,900</b>	<b>1.98</b>	<b>0.70</b>	<b>0.00205442</b>	<b>\$ 6,662</b>
Large Office, taxable at full rate	D	T	39,008,780	1.98	1.00	0.00293488	\$ 114,486
Parking Lot - PIL - Full Taxable	G	F	11,686,230	1.98	1.00	0.00293488	\$ 34,298
Parking Lot, taxable at full rate	G	T	10,614,063	1.98	1.00	0.00293488	\$ 31,151
Industrial - Full Taxable former PIL asmt	I	H	85,770	2.63	1.00	0.00389835	\$ 334
New Construction Commercial, taxable at full rate	X	T	23,659,750	1.98	1.00	0.00293488	\$ 69,439
New Con. Office, taxable at full rate	Y	T	7,543,520	1.98	1.00	0.00293488	\$ 22,139
			<b>395,180,398</b>				<b>\$ 1,156,105</b>

OBIAA understands its members. In the Municipal Act, it clearly states that a member of a BIA is both the property owner (commercially assessed) and the tenant. In weighting our decisions and our suggestions, we understand we must consult with both and have done so.

- Created and disseminated media releases to members (440), partner organizations (AMCTO, AMO, EDCO, etc.) (60), municipal representatives (Heads of Council - 385)
- Engaged conversation through Social Media

Through our consultations and the information received through our Return on Investment project, we have kept Councils informed of our stand on the Vacant Unit Rebate. Via the above-noted vehicles we are informing Councils of our multi-year economic development tool “Attraction Rebate”.

\*(see above: **Attraction Rebate for Main Street Class**).

### Possible Solutions

We applaud the suggested changes by the Ministry of Finance in their Vacancy Rebate and Reduction Program Changes. In this partnership between the province and OBIAA, we want to be able to provide education, training and sample materials to municipalities and BIAs on how they might choose to use this new legislation. We propose striking a working committee that would include provincial stakeholders, such as representatives from MMAH, AMCTO, BIA representatives and municipal staff, with the objective to create communications materials, sample bylaws (in clear terms) and best practices.





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### Testimonial:

*Before purchasing a commercial property in heritage district of Collingwood my personal opinion on the vacant commercial space tax rebate program was that it was ridiculous and favoured speculators over communities.*

*After purchasing 78 Hurontario which was in a dilapidated and vacant state, we immediately began a restoration process. This process included a timely application for building permit and project execution within 12 months. During this short term period/experience I would say the rebate is entirely helpful to me as a redeveloper and to the community in supporting reinvestment (I am investing over \$400K in the restorations). In fact I would support a larger rebate (50%?). However, if I was not actively trying to lease/rent (at fair market value) or actively renovating (I recommend a max 2-3 year total time frame) then a rebate would not be appropriate. In fact such a speculation on unused land should be penalized not supported by the tax structure.*

*I might also recommend the Vacant Unit Rebate title be changed to “Development Incentive Rebate”.*

Best regards,

Andrew Conway P.Eng.  
Vice President | CHEMFIL

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## SUCCESES: ACCESSIBILITY

Issues:	Accessibility Project 1: EnAbling Change	Accessibility Project 2: Accessibility Smart Businesses
<p>Our basic downtown infrastructure has not changed radically since the 1960's, although many outside influences have changed. Limited accessibility has always been there. New awareness, changing demographics, an aging population and new legislation, which has been introduced to break down the barriers, has changed this landscape. OBIAA, therefore, is presenting some challenges and recommendations that will align with these changes and help to make our 'Main Streets' more accessible.</p> <p><b>Challenges:</b></p> <p><b>1. Physical Barriers at street level:</b></p> <ul style="list-style-type: none"> <li>Buildings that don't align with sidewalks</li> </ul> <p>'Stop Gap' resistance: many municipalities consider the ramp an unacceptable encroachment, a trip hazard. <i>See Success/Challenge Story #1</i></p> <p><b>2. Access to upper stories and basements:</b></p> <ul style="list-style-type: none"> <li>Intensification and better use of built form: vacant second stories renovated to apartments, offices, retail. For example Zoning, Official Plan, Development Plan, CIPs</li> <li>Commercial demand: street level rents prohibit some uses which could either go to upper stories or basements in the same building, or move out of the BIA to cheaper street level alternatives.</li> <li>Mixed use: "Places to Grow" promotes live/work</li> </ul>	<p>In 2014/2015, OBIAA set out to educate BIAs and their local businesses throughout Ontario about the AODA through a broad and comprehensive provincial outreach and engagement strategy. OBIAA's project involved sharing tools, resources, and best practices, as well as offering workshops, webinars and other various methodologies to ensure that local businesses (and BIAs by extension) understood and met their obligations under the AODA.</p> <p>Below is a list of highlights of Phase 1 of that project:</p> <ul style="list-style-type: none"> <li>Hired a Project Manager who was an industry and subject matter expert</li> <li>Established 13 member Advisory Committee and held 5 meetings</li> <li>Established 4 member Steering Committee to guide the project and provide input, direction and expertise. This group held monthly conference calls.</li> <li>Created a work plan, implementation plan and critical path to ensure optimum project success</li> <li>Developed and implemented a pre project survey to ensure we met the needs of BIAs</li> <li>Organized, implemented and hosted 20 workshops across Ontario with 1000 participants</li> <li>Delivered 4 webinars on the following topics; Accessibility and the Built Environment, AODA Guidelines – an Overview, Best Practices for Accessible Tourism and Tips for Hosting Accessible Events. 120 participants. All webinars were recorded and are regularly referenced.</li> </ul>	<p>Phase II of our project aimed to increase awareness and education amongst the BIA business members of the value of employing people with disabilities and provide businesses with additional resources to do so. We wanted to make AODA compliance information more easily accessible. Below is a list of the highlights of that project:</p> <ul style="list-style-type: none"> <li>Created 12 person Advisory Committee. 4 meetings representing 10 organizations</li> <li>Developed critical path to follow and plan project benchmarks and ensure optimal success</li> <li>Developed curated Information Kits for all Ontario BIAs. These kits were themed; The AODA, Employment Myths, Hiring Fears, Barriers, Business Benefits, Employment Supports, and Funding</li> <li>Published 4 AODA Case studies to identify and exemplify accessibility champions</li> <li>Updated AODA BIA Handbook</li> <li>Published 7 Newsletters</li> <li>Developed Branding for the information Kits including; a banner, a logo and an icon</li> <li>Created an Employers Engagement Campaign to inspire and educate employers about hiring employees with disabilities - primarily used social media platforms</li> <li>Delivered 3 Employer Forums; Hamilton, Collingwood, Peterborough totaling 110 participants</li> <li>Hosted 2 Open Calls for 19 BIA Staff and board members</li> <li>Delivered 5 Accessibility Community of Practice conference calls totaling 60 participants and 21 organizations</li> </ul>

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	<ul style="list-style-type: none"> <li>• Developed, produced and distributed an AODA Handbook for BIAs full of guidelines, tips, FAQs, best practices and applicable legislation</li> <li>• Published 4 issues of a project newsletter for distribution to all BIA's in Ontario</li> <li>• Enhanced website presence with a dedicated series of AODA guidelines and other relevant information</li> <li>• Created and implemented a communications and marketing plan to ensure maximum awareness and participation in all programs</li> <li>• Creation of a Main Street Accessibility Award, which is presented annually at the OBIAA Conference. The award is intended to highlight best practices and innovative solutions. 294 attendees</li> <li>• Created a sustainability plan to ensure future success and continuance of projects</li> <li>• Created evaluation framework to determine impact of the project including a post project survey</li> </ul> <p>Through the project, our message directly reached <b>643,705</b> individuals and organizations and we indirectly reached <b>431,256</b>.</p>	<ul style="list-style-type: none"> <li>• BIA Governance Training enhanced to include accessibility as one of the training topics</li> <li>• Enhanced BIA AODA website pages totaling 1040 page views</li> <li>• Hosted workshop and plenary session at Annual BIA Conference</li> <li>• Developed BIA e-newsletter content for 12 BIA newsletter issues</li> <li>• Created evaluation framework to determine impact of the project</li> </ul>
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### Results

These Accessibility projects were deemed so successful that our Advisory Committee recommended that OBIAA consider passing a resolution for the BIAs to include accessibility as part of their strategic plans. With full support, the OBIAA Board resolved that:

#### **“BIAS WILL INCORPORATE ACCESSIBILITY FOR PERSONS WITH DISABILITIES AS A STRATEGIC FOCUS IN THEIR ANNUAL PLANNING”**

This was done to encourage the embedding of accessibility in the practices, policies and procedures of Ontario BIAs and to empower BIA staff to increase their engagement with the work of accessibility. We thank the Accessibility Directorate for our past partnership opportunities and look forward to continuing our advances of accessibility issues and opportunities in BIAs.



Presentation to PERL Deputies Committee – March 2017

2017 PERL OPPORTUNITIES: RED TAPE TASKFORCE

<u>Issues:</u>	<u>Challenges:</u>	<u>Possible Solutions:</u>
<p>Red Tape continues to be identified by our membership as one of the top three hardships in their ability to compete, sustain themselves and create jobs and wealth for Ontarians.</p>	<p>While many of these types of regulations can be effective and even protect public interests, they can also stifle economic growth, impose high costs on businesses and impede private sector investment.</p> <p>We understand that this government, through the Ministry of Economic Development and Growth, has established a Task Force to deal with Red Tape, but in review of the consultations, which include automotive parts manufacturing, food processing, financial services, mining, chemical manufacturing and forestry, we note small business is not included.</p>	<p>Our objective is to be included in this Task Force initiative with the end goal being to allow businesses across Ontario to operate in a modernized regulatory system that provides them with the flexibility they need to serve their customers.</p> <p>We are recommending OBIAA be a voice for reducing red tape for small businesses and Ontario “Main Streets” (BIAs).</p>

Presentation to PERL Deputies Committee – March 2017

2017 PERL OPPORTUNITIES: DATA COLLECTION



## Return on Investment of **BIAs**

Issues:	Challenges:	Possible Solutions:
<p>OBIAA is seeking critical research and needs the support of the Province to 'make the business case for BIAs' in a community, and province-wide. Partnering to define project objectives from a business perspective, to convert this knowledge into a data mining strategy and complete a preliminary project plan. The strategic goal is to quantify the 'return on investment' for the support and economic impact of BIAs.</p> <p>We understand the Province, through various reports and surveys, such as the MMAH's Financial Information Report (FIR), has resources and capabilities to assist in gathering this data. Together we could:</p> <ul style="list-style-type: none"> <li>• Identify the type of information required</li> <li>• Identify the information gaps</li> <li>• Aggregate the various data (Economic Impact of BIAs, Return on Investment, Community Development Initiatives (CIPs))</li> <li>• Produce reports that are easily interpreted through a BIA lens to support our community development efforts</li> </ul>	<p>OBIAA does not have data to support youth employment; we can cite many examples of youth's first jobs being in their local community/BIA, whether in the local market or ice cream parlour. Our BIAs employ many students through programs such as the Summer Experience Program. This type of data can only be collected by the Province.</p>	<p>Through the PERL Secretariat, we are advocating for a multi-ministry partnership with OBIAA to launch a research project to gather available data to understand and quantify the economic impact of BIA's and their stakeholders.</p> <p><i>This partnership could involve:</i></p> <ul style="list-style-type: none"> <li>• University Research</li> <li>• Identifying Potential Grants</li> <li>• Adding questions to MMAH's FIR</li> <li>• Aggregating all appropriate data available throughout various Ministries</li> <li>• Identifying Data Sets and gaps</li> </ul>
Results		
<p>Based on our submission to PERL in 2015, the Ministry of Municipal Affairs worked with OBIAA to create a Transfer Payment Agreement (TPA) for a Return on Investment Project.</p> <p>The goal of the project includes four (4) phases to determine the return on investment and to 'quantify and qualify' the economic and community impact of provincial Business Improvement Areas (BIA). The project will ultimately provide the success factors of the current and future state of BIAs. It is intended that the information will assist the</p>		

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Province, OBIAA and municipalities in guiding future economic development and community planning decision-making in a changing economy. The project did identify the need for success benchmarks for future trending and tools that would be implemented by BIAs and their municipalities to assist in determining the state and needs of local economies as well as future data collection.

The ROI on BIAs Final Report will address the importance of gathering current data and to understanding and addressing gaps in the required data. This work will help with identifying the need to provide tools, templates and possibly training to BIAs and to allow BIAs to gather socio-economic data easily.

The ROI on BIAs Project four (4) phases are:

PHASE I – Background Research

PHASE II – Establishing the Indicators

PHASE III – Data Analysis and Monitoring Implementation

PHASE IV – Knowledge Sharing

The project has just concluded Phase III and as it launches Phase IV, we are taking the opportunity to begin our sharing of the key findings with you, the PERL Deputy Ministers (See Appendix D). The ROI Project Team anticipates submitting our Final Report to the Ministry of Municipal Affairs at the end of this month.

It is our intention to present the Executive Summary and Key Findings and share with you an overview of the project at the PERL Meeting on March 8, 2017.

As we approach the completion of the ROI on BIAs Final Report, gaps and further issues are emerging. Many data sets could not be accessed, due to lack of time and resources under the existing parameters of the TPA, resulting in a further Partnership Opportunity request.



Presentation to PERL Deputies Committee – March 2017

2017 PERL OPPORTUNITIES: DATA COLLECTION – PART TWO

Issues:	Challenges:	Possible Solutions:
<p>OBIAA submitted our proposal to the Ministry of Municipal Affairs, subsequent to our PERL 2015 submission. In that submission, OBIAA clearly identified we would be identifying data gaps as well as undertaking a jurisdictional review of how municipalities track and evaluate the role of BIAs.</p> <p>The Return on Investment of BIAs is focused on capacity building and, as such, is not a report card on our BIAs. OBIAA's goal is to be a catalyst for positive community and economic change, enabling growth in Ontario BIAs. So this project, we hope, will help BIAs around the province increase their capacity and understanding in order to position themselves as historically rooted, recognized and respected community and business hubs.</p> <p>We were challenged, as a team, to determine the indicators of success to find the data we required and to create an informative and useful Final Report. We knew from the beginning that it would be a difficult task; that there would be data gaps and that this Final Report could not or should not be final. We recognize the need for ongoing data collection, a repository for the data and for ongoing reporting.</p>	<p>The challenges were many; such as determining the indicators, as well as accessing the data that was available.</p> <p>The Project Team approached MPAC and Stats Canada in order to gather available data to discover obtaining the data was outside of the financial scope of the project.</p> <p>Additionally, municipalities reported being overburdened with work and therefore receiving their data sets based on the GIS files was difficult. While we found that each municipality had different and varying data sets and collections, we commend those municipalities who understood the value of the work we were doing and assisted us.</p> <p>Finally, we realized the project, in order to have future relevance, had to become a baseline for our information. To determine growth in capacity, OBIAA has to continue to measure and analyze the economic and social impact of our BIAs.</p> <p>The “Gross District Product” or “Gross Downtown Product” (GDP) was identified as a tangible calculation, as defined by sales data, land area denominators and employment (see Barrie BIA diagram below).</p>	<p>OBIAA would like to submit a second proposal to continue this work to determine:</p> <ol style="list-style-type: none"><li>1. How to close the data gaps</li><li>2. Creation or identification of a centralized data portal (who and where)</li><li>3. Funding to reach data that was previously financially unobtainable</li><li>4. French translation of the Final Report</li><li>5. Changes to MMAH's Financial Information Report (FIR) and understanding of ongoing analysis of the FIR</li><li>6. Collaboration in capacity building for OBIAA and BIAs in order to continue to support small business and community development</li><li>7. Tool development for BIAs to use to track their GDP as well as education of BIAs in the use and importance of data collection</li></ol>



# SECTION THREE

# APPENDIX



## APPENDIX A: Open For Business Consultation 2014

### Open For Business Priority 1

#### Provide Clarity and Improve Awareness of Compliance Obligations under the Accessibility

##### Background:

BIAs and their members have two primary concerns with regard to compliance:

- 1) Physical upgrades to their buildings; especially heritage buildings
- 2) Awareness about accessibility standards for customer service.

##### Results:

- OBIAA submitted two (2) EnAbling Change grant applications. As a result OBIAA has held 25 workshops across the province with business and BIAs.
- Four (4) Webinars and have posted many templates on our website - <http://obiaa.com/accessibility/>
- OBIAA has been proactive in engaging and communicating with their members by distributing information, templates, best practices, training, etc.

**OUTCOME:** This continued to be a strong priority and was brought forward to PERL 2015 and 2017. OBIAA continues to champion Accessibility on behalf of our members. See PERL Reports 2015 and 2017.

### Open For Business Priority 2 & 3

#### Priority 2 – Tourism Oriented Directional Signs (TODS) Program

##### Background:

This priority focuses on working with the province to make the application process, including availability of signs, and criteria related to sign locations, more accessible and applicable. To address:

- BIAs frustration about the application process
- Restrictions on # of TODS signs permitted in an area

##### Results:

- More rural downtown, trail access points, museums and cultural centres to qualify for signage
- Strengthening program awareness and service delivery
- Introducing new generic icons for a wide range of sign categories to be made available in late 2015 (including a rural downtown icon)



**OUTCOME:** The Ministry of Tourism, Culture and Sport changed the criteria for rural downtowns, raising the threshold from populations of 10,000 to populations of 20,000 and introduced a Rural Downtowns Logo with OBIAA consultation

#### Priority 3 – Regional Tourism Organizations (RTOs)

##### Background:

BIAs have indicated that there is no “one access point” for them to engage with all the RTOs. BIAs would like to have a more direct connection and recognition when working with Regional Tourism Organizations to help brand and market downtown shopping areas and bring attention to BIA features and events.

##### Results:

The results are ongoing as OBIAA has met with the RTO's, in a face-to-face meeting and has begun dialogue with this important sector and are currently engaged in finding ways for the RTOs to participate in our 2016 BIA Conference in London, ON – April 10 to 13, 2016. Working ongoing.

##### OUTCOMES:

- ♦ The OBIAA met to present its priorities at a RTO executive directors meeting and RTO executive directors were advised of National BIA Conference.
- ♦ Another outcome of the OFB Roundtable process was confirming the appointment of a MTCS Ministry Liaison to OBIAA's Board.

### Open For Business Priority 4

#### Streamline and Simplify Information related to Festivals and Events Permitting

##### Background:

OBIAA, with the assistance of Service Ontario was/is

##### Results:

We targeted Municipalities to begin a test pilot tool for an All-In-



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<p>looking for a way to Streamline and Simplify Information related to Festivals and Events Permitting</p>	<p>One online application in ONe-Source for Business, we have yet to have more than one Municipality express interest in working with OBIAA and Service Ontario to provide a test pilot. Identifying and confirming Municipalities is still ongoing.</p> <p><b>OUTCOME:</b> OBIAA brought in Festival and Events Ontario (FEO) to partner on this specific project. Together ServiceOntario, FEO and OBIAA have continued to champion this priority and are in the process of working with a pilot Municipality to launch a test.</p>
<p><b>Open For Business Priority 5</b> <b>Establishment of an OBIAA Forum for Working Across Provincial Government</b></p>	
<p><b>Background:</b> Businesses on Ontario's main streets, through BIAs and OBIAA, need to deal with multiple ministries on multiple issues. OBIAA asked for the establishment of a multi-ministry forum to help address long-term and strategic priorities.</p>	<p><b>Results:</b> The MMAH aligned this priority with the Planning, Environment, Resources and Land Deputy Ministers committee, where OBIAA presented for the first time in October of 2014.</p> <p><b>OUTCOME:</b> OBIAA met with PERL Deputy Ministers in 2014, 2015 and again in 2017, and is successfully completing our first joint project on the Return of Investments of BIAs (ROI on BIAs).</p>

## APPENDIX B: PERL Deputy Ministers' Meeting 2014

### Priority 1: Vacant Unit Rebate

**Background:** Vacant properties exist within our BIAs. Owners of these vacant properties are entitled to apply for a Vacant Unit Rebate 364. (1). Without the incentive to develop or seek a lease, often these vacant properties deteriorate reducing the assessment value of the area and negatively impacting the visual appearance of our main streets.

#### Possible Solution(s):

- Adopt a property standards policy to coincide with the rebate
- A joint strategy between BIAs and the province should be established to promote tenatable property within a Downtown
- Update policy to include a sunset clause so it ends at a pre-determined time or graduated rebate
- Adopt a strategy that aligns Vacant Unit Rebate with tenancy incentives
- "Attraction Rebate" rather than Vacant Unit Rebate

#### Results:

- OBIAA has begun to develop an "Attraction Rebate" for consideration and will be submitting this in the PERL 2015 Report, under Priority Three (3) - Assessment

### Priority 2: Importance of Government Agencies' location to BIAs

**Background:** In many places Government Agencies are a large employer and they also attract people seeking the services they offer. Decisions to relocate outside of a BIA can have a significant negative economic impact on the BIA area.

#### Possible Solution(s):

- Government institutions add shoppers (government employees) to the community
- Attract residents/customer base to these institutions.
- Often an un-tenantable building.
- OBIAA suggested a Policy Statement be developed for communication to all government assets/agencies that addresses:
  - Social, economic and environmental impact of relocation outside of a 'downtown/core historical area'
  - Engagement of the local BIA
  - Encourage conscious decision to locate in their downtowns to support their vibrancy

#### Results:

As a follow up to this concern, we note that the Ministry of Finance has been tasked with looking at ways to maximize the value of Government assets and we request that the our BIAs (and their Business Members) are brought into consideration in making the decisions, over the future of these assets and specifically, how they may benefit downtowns. This Priority is still pending and OBIAA is addressing these buildings further with Priority Three (3) – Assessment

**OUTCOME:** This issue continues to be a major priority to OBIAA and we echoed these concerns again at PERL 2015.

### Priority 3: Funding for BIAs beyond the Levy

**Background:** BIAs are restricted by regulations that prevent them from applying solely to programs that would allow them to initiate projects that would have broad community benefit – such as Ontario Trillium Fund and programs that focus on arts and culture. As well, BIA should have the opportunity to make application for small scale infrastructure projects without the need to partner with the municipality

#### Possible Solution(s):

- Review status of BIAs as potential funding applicants
- Separate stream for BIAs for small infrastructure projects
- Access to funding as a primary applicant
- OBIAA become a granting body and/or a resource of funding programs for BIAs

#### Results:

- OBIAA will be making a submission to the MMAH on the status and definition of a BIA as a part of their Legislative Review
- Priority One (1) of the 2015 PERL Report will focus on the Legislative Review of the Municipal Act

**OUTCOME:** In 2015, OBIAA submitted recommended changes to the Municipal Act, section 204 regarding the status of BIAs. Unfortunately for our BIAs, Section 204 remains unchanged.

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		See PERL 2015 and 2017, Municipal Act Submission.
<b>Priority 4: Employee Health Tax (EHT) – BIAs</b> <b>Background:</b> BIAs are ABCs (Agencies, Boards or Commissions) of Ontario Municipalities. The BIA's Municipality claims the \$475,000 EHT exemption and applies it to their payroll. Therefore no allowable exemption remain for BIA payrolls, or to any of the other ABCs of the Municipality. BIAs are Local Boards of the Municipality, and are non-profit and often small employers. This places undue hardship on the BIA and their business members who pay an additional levy to the BIA (BIAs are self-funded).		
<b>Possible Solution(s):</b> <ul style="list-style-type: none"> <li>Exemption should apply separately to BIA payrolls not be shared with the Municipality payroll</li> <li>Amnesty period should be applied to back assessments</li> <li>Starting in 2014, EHT payments should be required</li> <li>Past years should not be requested</li> <li>Penalty charges should be waived</li> </ul>	<b>Results:</b> <ul style="list-style-type: none"> <li>OBIAA will be making a submission to the MMAH on the status and definition of a BIA as a part of their Legislative Review</li> <li>Priority One (1) of the 2015 PERL Report will focus on the Legislative Review of the Municipal Act</li> </ul>	<b>OUTCOME:</b> In 2015, OBIAA submitted recommended changes to the Municipal Act, section 204 regarding the status of BIAs. Unfortunately for our BIAs, Section 204 remains unchanged.
<b>Priority 5: Definition of Small Business</b> <b>Background:</b> Small business is the engine of the economy, however the 'definition of small business' is not clearly defined, with different levels of government definitions varying. A unified definition of small business is critical for government in order to capture the economic contribution and value of small business.		
<b>Possible Solution(s):</b> <ul style="list-style-type: none"> <li>"Main Street" businesses are unique in industry standards and should be defined separately/differently</li> <li>Development of consistent definition for small business</li> <li>Create a class/definition that clearly defines "Main Street" type businesses</li> <li>Measure the economic and employment impact of local Small Business</li> </ul>	<b>Results:</b> <ul style="list-style-type: none"> <li>MMAH indicated the MEDEI will review its Business Enterprise Centres to identify additional data concerning downtowns as important indicators of prosperity. Still Pending</li> <li>OBIAA to continue to work on defining and reclassifying BIA member businesses with the goal of highlighting the value-added by vibrant downtowns and Main Streets</li> <li>OBIAA continues this discussion in the 2015 PERL Report under the Data Collection section</li> </ul>	<b>OUTCOME:</b> No definition of Small Business has been determined.  OBIAA and MMA are working in partnership to determine the ROI on BIAs. See PERL 2015 and 2017.

## APPENDIX C: 2015 PERL PRIORITIES EXECUTIVE SUMMARY

### PRIORITY #1: MUNICIPAL ACT

**Background:** In October, OBIAA will be submitting a positioning paper regarding the Municipal Act Review.

#### Possible Solutions:

- **Definition of BIAs:** We ask that the definition of a BIA be expanded and amended to include 204. (1) (b) as follows:

*“to promote the area as: economic development, community and place-making, living space, attracting tourists, employment hubs”*

- **BIAs as Local Boards:** A clear statement on the ways in which BIAs differ (diverge) from other local boards.
- **Interpretation of the Municipal Act (204-216):** A clear statement that Section 216 does not apply to BIAs.

#### Results:

We are taking this opportunity to present our recommendations to the PERL Deputy Minister’s Committee to gain insight and your understanding in order to garner support and inform our recommendations.

**OUTCOME:** In 2015, OBIAA submitted recommended changes to the Municipal Act, section 204 regarding the status of BIAs. Unfortunately for our BIAs, Section 204 remains unchanged. See PERL 2017.

### PRIORITY #2: HISTORIC BUILT FORM ACCESSIBILITY

**Background:** Our basic downtown infrastructure has not changed radically since the 1960’s, although many outside influences have changed. Limited accessibility has always been there. New awareness, changing demographics, an aging population and new legislation, which has been introduced to break down the barriers, has changed this landscape.

#### Possible Solutions:

- **Physical Barriers at Street Level:** Encourage municipalities to find ways to make temporary solutions like ‘Stop Gap’ work. When helping with infrastructure programs include improving accessibility at street level as a condition.
- **Access to Upper Storeys and Basements:** Clarify accessibility requirements for festivals, events, and agencies receiving Provincial funding; establish support through direct funding or tax incentives (CIPs) to renovate for accessibility in upper floors and basements.

#### Results:

We are taking this opportunity to present our recommendations to the PERL Deputy Minister’s Committee to encourage the Province to aid municipalities for improved accessibility guidance in Historic Built Form.

**OUTCOME:** Review of successes to date at PERL 2017.


### PRIORITY #3: ASSESSMENT

**Background:** Assessment is a complex and broad topic. It has many different elements to consider that can have a profound effect on a BIA’s operation and ultimate success. The following related issues, as identified by local BIA Boards and/or their members, are considered very important:

1. Vacant Unit Rebate
2. Municipal Property Assessment Corporation (MPAC)
3. Government Building Exemptions



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<ol style="list-style-type: none"> <li><b>Attraction Rebate for Main Street Class</b> (non-office towers): Year One - 100% of the 30% (Commercial) or 35% (Industrial); Year Two - 50 % of the 30% or 35%; Year Three - 25 % of the 30% or 35%; Year Four - 0% of the 30% or 35%.</li> <li><b>MPAC Methodology:</b> We recommend and request that property assessment in/on Ontario Main Streets/BIA's be reflective of 'current use' versus future potential valuation.</li> <li><b>Government Building Exemptions:</b> We submit that the province should lead by recognizing that where their operations are located within BIA designated zones, the for-profit enterprise should contribute to the local BIA levy.</li> </ol>	<p>We are taking this opportunity to present our recommendations to the PERL Deputy Minister's Committee to encourage appropriate Ministries to assist OBIAA with the implementation of our recommendations.</p> <p><b>OUTCOMES:</b></p> <ol style="list-style-type: none"> <li><b>Attraction Rebate for Main Street Class</b> (Vacant Unit Rebate): OBIAA has participated in the Ministry of Finance Business Tax Capping &amp; Vacancy Review. A repeal of the Vacant Unit Rebate is in second reading at the Provincial Legislature.</li> <li><b>MPAC Methodology:</b> OBIAA has been invited to participate in MPAC's new Industry Liaison Group (ILG)</li> <li><b>Government Building Exemptions:</b> Nothing to report.</li> </ol>
<div data-bbox="506 709 643 831" data-label="Image">  </div> <p>Return on Investment of BIAs</p> <p><b>PARTNERSHIP OPPORTUNITY: DATA COLLECTION</b></p> <p><b>Background:</b> The current challenge is the inability to quantify the 'return on investment' for the community vitality and economic impact of BIAs.</p>	
<p><b>Background:</b></p> <p>Through the PERL Secretariat, we are advocating for a multi-ministry partnership with OBIAA to launch a research project with the objective of gathering available data to understand and quantify the economic impact of BIA's and their stakeholders. This requires partnering to define project objectives from a business perspective, to convert this knowledge into a data mining strategy and complete a preliminary project plan.</p> <p><i>This partnership could involve University research, identifying potential Grants, adding questions to MMAH's FIR, aggregating all appropriate data available throughout various Ministries</i></p>	<p><b>Results:</b></p> <p>OBIAA is seeking ways and means to increase our capacity, understanding that this type of research is critical. OBIAA needs the support of the Province to 'make the business case for BIAs' in a community, and province-wide data collection initiative.</p> <p><b>OUTCOMES:</b> See 2017 PERL Submission and results of the Transfer Payment Agreement between MMA and OBIAA – Return on Investment of BIAs Project.</p>

## APPENDIX D: Return on Investment Status Report – December 23, 2016

### The summary includes:

- ♦ Activities completed to date
- ♦ Key findings
- ♦ Variances from the Transfer Payment Agreements (TPA)
- ♦ Review of the project schedule and anticipated completion dates

### Key Milestones Achieved

<b>PHASE 1</b>	<ul style="list-style-type: none"> <li>/ All tasks in Phase 1 of the project have been completed.</li> <li>/ The background research report has been updated and released to the membership and public through a media release.</li> </ul>
<b>PHASE 2</b>	<ul style="list-style-type: none"> <li>/ All tasks in Phase 2 have been completed.</li> <li>/ Please note Task 2.6a Request for additional funding sits outside the scope of the TPA.</li> </ul>
<b>PHASE 3</b>	<ul style="list-style-type: none"> <li>/ Work on Task 3.1 underway and extensive.</li> <li>/ Key interviews proposed in Task 3.2 held off until Feb 2017 as municipal outreach best served to help identify how to address gaps in data capture.</li> <li>/ Weekly survey question implemented to gain feedback from membership as part of Task 3.2.</li> </ul>
<b>PHASE 4</b>	<ul style="list-style-type: none"> <li>/ Final report structure finalized.</li> <li>/ Communications plan not commenced.</li> </ul>

### Key Findings and Outcomes to Date

<b>Consultation</b>	<ul style="list-style-type: none"> <li>/ Response rates are consistent across the weeks completed to date. Although numbers aren't high enough to provide significant sample.</li> <li>/ Some glitches in the feedback through the survey</li> <li>/ Summaries of consultation activities to date can be prepared for input into final report, including Webinar #1, Survey #1, Summary of Weekly Questions Survey to date, AC Meetings.</li> <li>/ Webinar #2 scheduled for Jan 17/17: <ul style="list-style-type: none"> <li>o Add a question to the membership – “How do you want to be engaged?”</li> <li>o Quick discussion on Dec 19<sup>th</sup> at 10AM to check in before break</li> </ul> </li> </ul>
<b>Data Analysis</b>	<ul style="list-style-type: none"> <li>/ Feedback from municipalities on the data sheet has been patchy. Extended the deadline until mid January 2017. <ul style="list-style-type: none"> <li>o 7 Data Agreements back.</li> <li>o 41 shape files received.</li> <li>o 0 data sheets completed.....although approximately 30 municipalities have work underway.</li> </ul> </li> <li>/ MPAC data is cost prohibitive under the terms of the TPA. Assessment indicator will need to be identified as a future ask, and existing gap.</li> <li>/ Real Estate Board sales values will be beneficial to demonstrate uplift vs decline.</li> <li>/ City of Toronto data access and BIA engagement to be encouraged and explored in the new year.</li> <li>/ Final Cut Off Date for receiving data for final report is JANUARY 15th, 2017.</li> </ul>
<b>Communication</b>	<ul style="list-style-type: none"> <li>/ Evite for Webinar #2 sent to membership.</li> <li>/ Social media content generated for early January 2017.</li> <li>/ Release of consultation summary report scheduled for Early February 2017.</li> </ul>

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*The Advisory Committee committed to the following BIA Story to provide a basis for the report:*

**A BIA is integral to advancing a distinct, livable, vibrant and resilient business district within their local community.**

*The Advisory Committee agreed on the following Audiences that this report will speak to:*

- ◆ Government (Municipal, Provincial, and Federal)
- ◆ BIA Membership (Property Owners, Business Owners)
- ◆ Community/Broader Public (Neighbourhood Associations, Institutions, Industry outside of the BIA)

*The Advisory Committee agreed on the final indicator set for the project.*

- ◆ 4 major themes
  - Street appeal
  - Economic Development
  - Supporting Local Business
  - Community Building
- ◆ 45 indicators, grouped to a collective set of 30 indicators.
- ◆ Attached list for reference.

### Project Schedule

The project schedule is attached for reference. To date, the project has completed work up to task 2.2. *Notes when reviewing:*

- ◆ The light grey timeline reflects the schedule initially outlined the Transfer Payment Agreement with MMAH
- ◆ The dark grey timeline reflects the schedule proposed at the start of the project on April 19, 2016
- ◆ The *italic tasks* have been added to the schedule as part of the project program, but were not considered in the original TPA.
- ◆ Key Milestones:
  - Webinar #2 – January 17<sup>th</sup>
  - AC Meeting #6 (Last one, in person) – February 23<sup>rd</sup>
  - PERL Committee Meeting – March 8<sup>th</sup>
  - Final report deliverable – end of March 2017
  - OBIAA Conference – April 3<sup>rd</sup>, 2017

### Variances from Transfer Payment Agreement (TPA)

<b>Start Up:</b>	/ Project Kick Off meeting 5 weeks after scheduled start in TPA; / Additional time and effort spent on retaining Advisory Committee members that represented a broad spectrum of expertise and BIA and Municipal leaders, and also reflected the regions of the province. (urban vs rural, central/eastern/western/northern representation, a variety of areas of specialization etc.) / Communications and consultation plan completed delayed until consultant appointed to finalize / Overall phase completed in line with preliminary project timeline
<b>PHASE 1:</b>	/ Background Report draft issue on target with circulation on August 26, 2016. Final completion delayed until Mid-September while we await results of Survey and Interview Findings. Does not affect timeline for deliverables / Overall phase completed 12 weeks after TPA target, but in line with preliminary timeline / Phase 2 and 3 tasks initiated early/ overlapped to make up time.
<b>PHASE 2:</b>	/ Survey issue delayed by one (1) week while questions reviewed and finalized / Advisory Committee Meeting #4 shifted by 2 weeks, to allow the final indicators to be selected post – feedback from Webinar #1 / Confirmation of indicators and hierarchy brought forward to November 1, 2016 – to allow for the entire month of November to be focused on indicator tracking/data capture / Overall phase tracking for completion early December 2016, 12 weeks after TPA target, but in line with preliminary timeline
<b>PHASE 3:</b>	/ Data findings and gap identification well underway. / Work commenced in September, brought forward by 12 weeks to overlap on schedule and make up time. / Note: Tasks 2.5 and 3.1 overlap, allowing for time in the schedule to be consolidated

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	<ul style="list-style-type: none"> <li>In place of key municipal contact interviews, the project team decided to reach out via weekly survey question to membership. The “Wednesday Weekly Question” survey has run for the past 7 weeks. Results are currently being tabulated.</li> <li>Overall phase tracking for completion late February 2016, 8 weeks after TPA timeline but in line with preliminary timeline</li> </ul>
<b>PHASE 4:</b>	<ul style="list-style-type: none"> <li>Final report structure discussed. Work to commence in January 2017.</li> <li>Communications plan not initiated as yet.</li> <li>Final report deliverable on track for completion end of March 2017.</li> </ul>

### Appendix D – ROI ON BIAS - Financials

	Phase 1	Phase 2	Phase 3	Phase 4	Budget Total	Actuals Total
<b>OBIAA Expenses</b>	\$ 10,500.00	\$ 3,750.00	\$ 6,000.00	\$ 2,250.00	<b>\$ 22,500.00</b>	<b>\$ 3,911.63</b>
Project Management	\$ 17,500.00	\$ 3,750.00	\$ 6,000.00	\$ 2,250.00	<b>\$ 29,500.00</b>	<b>\$ 25,937.75</b>
Advisory Committee	\$ 3,500.00	\$ 1,250.00	\$ 2,000.00	\$ 750.00	<b>\$ 7,500.00</b>	<b>\$ 5,869.11</b>
<b>Consultants</b>						
Preliminary Background Research	\$ 14,000.00	\$ -	\$ -		<b>\$ 14,000.00</b>	<b>\$ 10,829.00</b>
Jurisdictional Scan	\$ 14,000.00	\$ -	\$ -		<b>\$ 14,000.00</b>	<b>\$ 20,421.00</b>
Consultation Plan	\$ 3,500.00	\$ -	\$ -		<b>\$ 3,500.00</b>	<b>\$ 10,000.00</b>
Research - Survey Interviews, Determining Ind	\$ -	\$ 12,500.00	\$ -	\$ -	<b>\$ 12,500.00</b>	<b>\$ 6,948.00</b>
Gap Analysis	\$ -	\$ -	\$ 6,000.00	\$ -	<b>\$ 6,000.00</b>	<b>\$ 10,000.00</b>
Data Mining	\$ -	\$ -	\$ 20,000.00	\$ -	<b>\$ 20,000.00</b>	<b>\$ -</b>
Final Report	\$ -	\$ -	\$ -	\$ 4,500.00	<b>\$ 4,500.00</b>	<b>\$ -</b>
Graphic Design, Printing & Distribution	\$ 7,000.00	\$ 2,500.00	\$ -	\$ 3,750.00	<b>\$ 13,250.00</b>	<b>\$ 4,650.00</b>
Translation	\$ 1,250.00	\$ -	\$ -	\$ 750.00	<b>\$ 2,000.00</b>	<b>\$ -</b>
Knowledge Sharing and Communications (Plan)	\$ -	\$ -	\$ -	\$ 750.00	<b>\$ 750.00</b>	<b>\$ -</b>
	<b>\$ 71,250.00</b>	<b>\$ 23,750.00</b>	<b>\$ 40,000.00</b>	<b>\$ 15,000.00</b>	<b>\$ 150,000.00</b>	<b>\$ 98,566.49</b>
Received from MMAH	\$ 70,000.00	\$ 25,000.00			<b>\$ 95,000.00</b>	

### Appendix 2 – ROI ON BIAS – Workplan

ONTARIO BUSINESS IMPROVEMENT AREA ASSOCIATION PROJECT WORK PROGRAM		TPA DA TE	TARGET DA TE
<b>START-UP</b>			
1.1	Start Up and Kick-off Meeting with MMAH	March 15, 2016	April 19, 2016
1.1a	Preliminary Project Meeting - Introduction of committee and decision process	N/A	April 26, 2016
1.1b	Applications for Advisory Committee Members	N/A	May 6-24, 2016
1.1c	Expressions of Interest for Project Work + Appointment of Project Team	N/A	Mid May-June 14, 2016
1.2	Consultation + Communication Plan	April 1, 2016	July 15, 2016
1.2a	Project Brand	N/A	June 17, 2016
1.2b	Media Release to Mayors across Province	N/A	July 26, 2016
<b>PHASE 1 - BACKGROUND RESEARCH</b>			
1.3	Preliminary Background Research	April 15, 2016	Late July 2016
1.3a	OBIAA Advisory Committee Meeting #1 - Kick Off	N/A	June 30, 2016
1.4	Jurisdictional Scan	April 30, 2016	Late July 2016
1.5	Final Background Research and Best Practices Report	May 31, 2016	Early August 2016
1.6	OBIAA Advisory Committee Meeting #2 - Presenting background research	Late May 2016	August 11, 2016
1.7	MMAH Report Back	Late May 2016	Late August 2016



## Presentation to PERL Deputies Committee – March 2017

PHASE 2 - ESTABLISHING THE INDICATORS			
2.1	Outreach Digital Survey	N/A	July 25, 2016 - August 29, 2016
2.2	Key Interviews - with BIAs and Stakeholders	N/A	Early July-Late August 2016
2.2a	OBIAA Advisory Committee Meeting # 3- What We Heard + Evaluation Matrix	N/A	September 15, 2016
2.2b	Webinar #1: Best Practice Overview, Discussion on Indicators	N/A	October 5, 2016
2.3	OBIAA Advisory Committee Meeting # 4 - Determining Agreed Indicators	Late July 2016	September 29 2016
2.4	Confirmation of Agreed Collective Indicators + Hierarchy	August 31, 2016	Late October-Late Nov 2016
2.5	Preliminary Indicator Tracking	August 31, 2016	Late October-Late Nov 2016
2.6	OBIAA Advisory Committee Meeting #5 - Preliminary Data Analysis Findings	Late August 2016	December 1, 2016
2.6a	Application Request for Additional Funding Submitted	N/A	Early December 2016
2.6b	OBIAA Board of Directors Meeting	N/A	October 18-19, 2016
PHASE 3 - IMPLEMENTING THE MONITORING TOOLS			
3.1	Data Finding + Gap Identification	Late June-Early August 2016	Late Nov 2016-Early Jan 2017
3.1a	Key Interviews - with municipal staff and BIA executive	N/A	Late Nov-Late Dec 2016
3.1b	Webinar #2: Presenting Selected Indicators, Gaining Feedback	N/A	January 17, 2017
3.2	Data Mining	December 30, 2016	Late Nov 2016-Late Feb 2017
3.2b	OBIAA Board of Directors Meeting	N/A	January 18-20, 2017
PHASE 4 - KNOWLEDGE SHARING			
4.1	Development of Phase IV Communication Plan	Late March 2017	Early Jan-Late Feb 2017
4.2	OBIAA Advisory Committee Meeting #6 - Recommendations / Final Report	February 23, 2017	February 23, 2017
4.2a	OBIAA Board of Directors Meeting	N/A	March 8-9, 2017
4.2b	MMAH Report Back	N/A	Late March 2017
4.2c	Media Release to Mayors across Province	N/A	Late March 2017