

Ontario Municipal Board Hearing

Joint Witness Statement of

***Lee Parsons, P.Eng, MCIP, RPP and
Christina Heydorn, MCIP, RPP, PLE***

City of Ottawa

Official Plan Amendment No. 76

OMB Case No: PL100206

**JOINT WITNESS STATEMENT OF
LEE PARSONS AND CHRISTINA HEYDORN**

Qualifications of Lee Parsons

1. I am a principal in the firm of Malone Given Parsons Ltd. (“MGP”). MGP’s offices are located at Suite 201, 140 Renfrew Drive, Markham, Ontario.
2. I am a professional market analyst, land use planner and land economist with over 30 years of experience. I have been responsible for managing market analysis, urban planning, and economic and development studies for a wide range of projects throughout Canada and internationally. A copy of my curriculum vitae is attached to this witness statement as Attachment A.
3. I have worked extensively on growth management and land needs analyses projects for both the public and private sectors, including residential, commercial and employment planning policies; economic impact analyses; and market analyses for residential, retail/commercial, entertainment, tourist, office, and employment projects. Relevant assignments completed in the City of Ottawa include *Managing Growth, City of Ottawa* dated June 2007 for Richcraft Group of Companies, and a September 2005 report entitled *Choices of Housing in the City of Ottawa, Response to the Where Will We Live? Report* for the Ottawa-Carleton Home Builders’ Association.

Qualifications of Christina Heydorn

4. I am a senior project manager in the firm of Malone Given Parsons Ltd. (“MGP”). MGP’s offices are located at Suite 201, 140 Renfrew Drive, Markham, Ontario.
5. I am a professional land use planner and land economist with over 9 years of experience. I have been responsible for managing land need analyses, market analyses, and growth management studies for a wide range of projects in Ontario and the Middle East. A copy of my curriculum vitae is attached to this witness statement as Attachment B.
6. I have worked on growth management and land needs analyses projects for both public and private sector clients, including residential, commercial and employment market land needs analyses in the City of Ottawa. Relevant assignments completed in the City of Ottawa include *Managing Growth, City of Ottawa* dated June 2007 for Richcraft Group of Companies, and a September 2005 report entitled *Choices of Housing in the City of Ottawa, Response to the Where Will We Live? Report* for the Ottawa-Carleton Home Builders’ Association.

History

7. In 2003, the new City of Ottawa adopted its first Official Plan, in response to which the Ottawa-Carleton Home Builders’ Association (“OCHBA”) and a number of land developers filed appeals with respect to the expansion of the urban boundary, growth management policies, and related matters. We understand that following consultation with City of Ottawa (“City”) staff and based on a commitment

that the City and OCHBA would continue to discuss these policies with the intention of attempting to resolve OCHBA's ongoing concerns, OCHBA and the developers withdrew their appeals.

8. We understand that based on this commitment, City staff contacted the Greater Ottawa Home Builders' Association (GOHBA) in or around the end of 2006 to engage in discussions as part of the City's 5-year Official Plan review. At that time, City staff was using a planning horizon of 2031 for the Official Plan review.
9. In early 2007, City staff wrote a report for Planning and Environment Committee ("PEC"), Agriculture and Rural Affairs Committee ("ARAC"), and Council recommending the scope and timing of the review of the Official Plan, Transportation Master Plan and Infrastructure Master Plan. Among other things, staff recommended that the Official Plan review would investigate the adequacy of both employment and residential lands to around 2031. Council adopted that recommendation in April 2007.
10. To the best of our knowledge, at no time between April 2007 and May 2009 did staff, PEC, ARAC, or Council suggest or adopt a planning horizon other than 2031. All components of the Official Plan review and the Transportation Master Plan and Infrastructure Master Plan were predicated on the 2031 planning horizon.
11. In February 2007, members of GOHBA began monthly meetings with City planning staff to consult on the subject of the Official Plan review. The group's ("City/GOHBA Working Group") discussions focused primarily on residential land policies and the requirements for urban land to 2031.

Retainer

12. As the discussions during the City/GOHBA Working Group meetings became increasingly technical, GOHBA determined that it would be appropriate and necessary to retain the services of MGP. In November 2007, MGP was approached by GOHBA and asked to participate in the City's Official Plan review process and to monitor and comment on the City's residential land needs analysis and policies as they pertained to the requirement for urban land in the City to 2031.
13. MGP reviewed the City/GOHBA Working Group meeting presentations and notes for meetings between February 2007 and October 2007. MGP thereafter contacted GOHBA's representative and advised that it would be prepared to assist.
14. Ms. Heydorn attended City/GOHBA Working Group meetings in November and December 2007 and then advised GOHBA in January 2008, that it would be necessary to undertake independent work to be able to contribute to the Official Plan review consultation process. GOHBA agreed and authorized MGP to undertake this work in an effort to achieve consensus with City staff on proposed residential policies and on all of the "building blocks" that would lead to a determination of whether an urban expansion was required and, if so, to what extent.
15. Between November 2007 and March 2009, MGP actively participated in the City/GOHBA Working Group meetings and regularly corresponded with City staff on growth management, residential planning policy, and urban land requirement issues. More specifically, Ms. Heydorn attended 21 City/GOHBA Working Group meetings and made one presentation to PEC and another to a Joint ARAC/PEC meeting.
16. The City/GOHBA Working Group was unable to achieve consensus on a number of the "building blocks".

17. In November 2008, the City released a report entitled *Residential Land Strategy for City of Ottawa 2006-2031* (“*City’s Strategy*”). Among other things, the *City’s Strategy* concluded that an urban boundary expansion of 851.4 gross hectares was required to accommodate residential growth to 2031.
18. On November 24, 2008, City staff appeared before PEC requesting authorization to table a draft Official Plan Amendment in January 2009.
19. Ms. Heydorn appeared at the November 24, 2008 PEC meeting and, after presenting details on City/GOHBA Working Group areas of agreement and disagreement by “building block”, recommended that PEC, “direct staff to reconsider and justify the growth and development assumptions used in the *Residential Land Strategy for City of Ottawa 2006-2031* and reflected in the draft Official Plan policies and Infrastructure Master Plan”.
20. PEC considered staff’s recommendation and gave staff the direction they were seeking.
21. On February 2, 2009, the City tabled the Draft Official Plan Amendment (“February Draft OPA”) and released a revised *City Strategy* that again recommended an 851.4 gross hectare urban expansion for 2031.
22. In response, Ms. Heydorn and Mr. Parsons authored a report entitled *Ottawa’s Residential Land Needs, Response to the City of Ottawa’s Residential Land Strategy* (“*MGP’s Response*”) dated March 2009. Ms. Heydorn submitted the report and made a presentation in this regard at the Public Meeting that began on March 31, 2009. The report concluded that the *City’s Strategy* and the February Draft OPA did not provide a coherent and strategic approach to growth management. In addition, it concluded that the proposed expansion of the urban boundary was insufficiently sized and that 2,224.4 gross hectares was required to accommodate residential growth to the 2031 planning horizon. Errata to *MGP’s Response* are provided in Attachment C of this witness statement.
23. Ottawa City Council adopted OPA 76 in June 2009. In so doing and despite the 2031 planning horizon in OPA 76, Council modified the draft amendment to, “... accommodate a 15- year supply of land for residential purposes, ...”, and approved an urban expansion of approximately 230 gross hectares.
24. Following GOHBA’s appeal of OPA 76, MGP was asked to assist in the preparations for the impending OMB hearing.

MGP’s Response Update

25. In preparation for the OMB hearing, MGP and Altus Group Economic Consulting (“Altus”) have corresponded with the City on a number of the residential land needs “building blocks”. Discussions and the sharing of data have focused primarily on the issues of intensification and 2006 residential unit supply. Discussions and data exchange are continuing and, therefore, may result in further refinements to our residential land needs analysis.
26. With respect to urban area residential land supply, we have reviewed Mr. Feldgaier and Mr. Norman’s joint witness statement detailing the rationale for and approach to updating the 2006 residential land supply outside the Greenbelt. It is our opinion that there is merit in using updated data and estimates of supply that more accurately reflect what has been built since the beginning of 2007 and what is currently planned on land that was vacant at the end of 2006. This estimate includes units in that portion of the Fernbank Community that was brought into the urban area through the approval of OPA 77.

27. For the purposes of this analysis, we accept the results of Altus' updated urban area residential land supply outside of the Greenbelt. Recognizing that our demand is based on a mid-2006 to mid-2031 time period, we have added units built from July to December 2006 to Altus' supply totals. We acknowledge that the results presented in Mr. Feldgaier and Mr. Norman's joint witness statement may be subject to revisions based on continued dialogue with City staff.
28. The urban land requirements analysis presented in *MGP's Response* has been updated to incorporate the findings of Altus's updated 2006 urban area residential land supply outside of the Greenbelt. Using the updated 2006 supply estimates, the requirements for urban boundary expansion to 2031 is 2,507.5 gross hectares. The results of the update ("*MGP's Response Update*") are presented in Attachment D.

Evidence and Opinions

29. We intend to provide evidence and opinions on the following Issues:

Issue 1 Is the decision to adopt a 15-year supply of land for residential uses in the urban area, despite the Official Plan providing "a vision of the future growth of the City and a policy framework to guide its physical development to the year 2031", consistent with the 2005 Provincial Policy Statement, in conformity with the City of Ottawa Official Plan, and does it represent good planning? If not, what is the appropriate time horizon for the City's urban residential land supply?

30. In our opinion, the decision to adopt a 15-year supply of land for residential uses in the urban area is not consistent with the 2005 Provincial Policy Statement ("2005 PPS"). The *City's Strategy* and Draft OPA were written with the assumption that the planning horizon was 2031. After Council made the decision to shorten the planning period for residential land only, City staff was required to rewrite OPA policies to reflect the decision. However, not all references to the 2031 planning horizon were modified, thereby creating confusing and conflicting policies. Ms. Sweet will speak to these matters.
31. City/GOHBA Working Group meeting notes, presentations, and correspondence confirm that Ms. Heydorn, development industry representatives, and City planning staff worked from February 2007 to December 2008 preparing growth projections, conducting land needs analyses, developing residential land strategies, and preparing integrated Official Plan policies to support residential growth to the 2031 planning horizon. Reports to PEC, ARAC, and Council over that time consistently linked residential land requirements to the 2031 growth projections. It was not until a May 4, 2009 staff report to Joint ARAC/PEC that planning staff, in response to Public Meeting comments, responded as follows:

For the analysis to support no need to expand the urban boundary, one of two changes would be required:

- a) Revising the housing projection in such a way that demand for single and semi-detached was reduced ...*
- b) Leave the projections as is and plan for a slightly shorter time period. That would mean instead of a 22-year supply of land for all housing types, the single and semi-detached supply would be about 18 years...*

Despite their response, City staff continued to recommend an urban expansion to provide sufficient urban land to 2031.

32. In our opinion, the decision to adopt an alternative time horizon for residential land that is not coordinated with the identified planning horizon of 2031 is not consistent with the 2005 PPS.
33. In our opinion, the appropriate time horizon year for the City's residential land supply is 2031 which is consistent with the planning period of OPA 76.
34. In our opinion, the limited expansion area adopted by Council is insufficiently sized to accommodate residential land requirements over a 15-year time horizon. This matter is discussed further under Issue 10 of this witness statement.

Issue 2 Does the decision to adopt a 15-year supply of land for residential uses and add 230 hectares of land to the City's urban boundary appropriately reflect other City policy documents, including but not limited to the Transportation Master Plan, Infrastructure Master Plan, Greenspace Master Plan (referenced in Section 1.5 of the Official Plan) and other Growth Management Plans (referenced in Section 1.4 of the Official Plan)?

35. In our opinion, the decision to adopt a 15-year supply of land for residential uses and add 230 hectares of land to the urban boundary creates risks for Ottawa's competitiveness that conflict with the City's 2003 *Economic Strategy* and 2010 *Partnerships for Prosperity*.
36. The City's April 2003 *Economic Strategy*, its supporting plans, and the City's June 2010 *Partnerships for Prosperity* which, "is linked to Ottawa's 20/20 Growth Management Plans", articulate a vision for the future of Ottawa that achieves improved liveability and prosperity. The reports recognize, among other things, that:
 - Ottawa's quality of life rests on its wealth of assets and its concentration of a skilled labour force;
 - A great quality of life attracts and maintains talented workers;
 - Businesses are attracted by talent and quality of life; and,
 - Quality of life can be measured through, among other things, increased affordability and choice of housing.
37. More specifically, the vision provided in *Partnerships for Prosperity* states:

Ottawa is recognized as a competitive global hub for innovation, knowledge-based talent, businesses and organizations. Its unique combination of recreational, social, cultural, and business assets, natural environment and physical infrastructure create sustainable prosperity for all its citizens, attracting businesses, visitors and new residents. (page 4)
38. In our opinion, the City's decision to constrain residential land supply will likely lead to higher urban land prices resulting in reduced housing affordability and, in turn, reducing Ottawa's attractiveness to those entering the housing market, particularly young professionals with families and immigrants. This poses significant risks for Ottawa's economic prospects. We will refer to the *Leapfrog Development in Adjacent Municipalities* work prepared by FoTenn and referred to in Ms. Sweet's witness statement and *Place of Work by Place of Residence* data provided in Mr. Feldgaier and Mr. Norman's joint witness statement.
39. The conclusions of *MGP's Response* is based on our opinion that a coherent and strategic approach to growth management is necessary to ensure that Ottawa will continue to be a place of innovation and prosperity.

Issue 3 Did the City use appropriate population and housing growth projections for the urban residential land needs analysis? If not, what are the appropriate projections?

40. MGP expressed concerns in an October 25, 2007 letter to the City that the draft Reference Projections for population (later adopted as the basis for the Official Plan Review and related Master Plan review and adopted by OPA 76) were too conservative:

We are concerned that the “Reference Projection” in the August 2007 Report to Planning and Environment Committee and Council is too low and does not accurately represent the future development context in Ottawa. We expect that an increasing share of Canada’s future employment growth and immigration will be focused on fewer urban centres and believe that Ottawa can continue to be one of the Country’s growth centres. In our opinion, the projections fail to consider a larger economic role of Ottawa in Canada in the future.

Nonetheless, we chose to accept the Reference Projections for population for the purposes of the Official Plan review.

41. As presented in Mr. Feldgaier and Mr. Norman’s joint witness statement, the Ontario Ministry of Finance (“MoF”) released new growth projections in June 2010 for the Province as a whole as well as for Census Divisions, including the City of Ottawa. These represent the most up-to-date population projections for the City of Ottawa to 2031 and should therefore be considered. Using the MoF growth projections together with all other assumptions in *MGP’s Response Update*, the requirements for urban boundary expansion to 2031 would be 2,994.6 gross hectares. The results of this analysis are presented in Attachment E of this witness statement.

Issue 5 Were the assumptions used by the City regarding the dwelling type propensities of residents over the projection period reasonable and defensible, based on available research and empirical data?

42. In our opinion, the assumptions used by the City regarding the dwelling type propensities of residents over the projection period were not reasonable or defensible, as they were predicated on the assertion that the effect of the proposed changes in policy would be dramatic shifts in housing choice over the planning period. In our opinion, the City used unreasonable propensity assumptions despite being cautioned by Hemson Consulting Ltd. (“Hemson”) with respect to their draft housing type propensity forecasts; contrary to trends shown in 1981 to 2006 Census data; and, contrary to advice given by MGP and developers at City/GOHBA Working Group meetings.
43. Hemson was retained by the City, “to review the [draft] forecast work to ensure that it provides a sound basis for long-term growth planning in Ottawa”. Hemson’s response was presented in an October 17, 2007 letter. In it, Hemson makes the following statements regarding contributing factors to housing choice:

The aging of the population will result in some increase in apartment demand, but the rate at which older age groups occupy apartments will not change in response to aging. In fact, statistical trends over the past 20 years indicate a declining apartment propensity amongst seniors. Seniors are living longer, remaining healthier longer and are wealthier than in previous generations. These factors are all leading seniors to remain in the “family home” for longer than in previous generations. (page 5)

The cost of land affects the market in a variety of ways and is no doubt closely tied to the declining lot size and the rise of the rowhouse market. The link between rising land costs and increased apartment

occupancy is more tenuous as the construction costs for apartments are much higher than ground-related units and the overall costs of units with similar market attributes is not necessarily less among apartments versus ground-related housing ... We would note that the issues around infrastructure provision and financing are largely challenges faced by municipal corporations and do not significantly affect the relative cost of housing, and not to the point where it might influence housing choices. (page 5)

We would caution that though a renewed interest in urban lifestyles is indeed a change from the 1990s within the current apartment market ... it is easy to overstate its influence as downtown redevelopment is still only a small part of the overall housing market. (page 6)

Finally, while an expectation of changing housing patterns is often hoped for by planners for reasons that are linked to rising fuel prices, there is little indication that this is the market response to fuel costs. (page 6)

44. Ottawa's 1981 and 2006 dwelling propensity by age of household maintainer data, as determined through the Census, was obtained by the City from Statistics Canada and was provided to MGP in January 2008 as part of City/GOHBA Working Group discussions on the matter. The chart provided in Attachment I shows the change in dwelling propensities by age of household maintainer between 1981 and 2006.
45. Dwelling type propensities were the primary topic of discussions at City/GOHBA Working Group meetings between November 2007 and February 2008 and were revisited again in June and July 2008. At these meetings, and again in her presentations to PEC in November 2008 and March 2009, Ms. Heydorn reiterated her opinion on Census and literature findings that state that housing preferences evolve slowly over time; that they reflect responses to a mix of planning policy, social, demographic, environmental, and economic conditions; and, that an increasing proportion of seniors are choosing to "age in place".
46. Appendix 2 of the *City's Strategy* provides the detailed housing propensity projections used by the City as the basis for the Scenario 3/Preferred Scenario new dwelling units by type for 2006 to 2031. While the text of the *City's Strategy* states that the Scenario, "represent[s] both an incremental market shift and support for a policy direction that fulfills the City's planning objectives," it is our opinion that the propensity assumptions used as the basis for the City's housing needs do not reflect a reasonable change in residents' future housing conditions.
47. The charts in Attachment J show the City's projected change in dwelling propensities by age of household maintainer between 2006 and 2031 as stated in the *City's Strategy*. The Scenario 3/Preferred Scenario chart shows that the City assumes that in 2031 there would be a lesser proportion of Ottawa residents in the younger age cohorts living in apartments compared to 2006. It also shows that there would be a greater proportion of residents aged 55 to 69 living in apartments in 2031 compared to 2006. In our opinion, these assumptions are not reasonable and defensible.
48. By comparison, we used Census trends, Hemson's peer review response, the findings of academic and professional literature, and our understanding of policy implications on land markets to inform our judgment on the 2006 to 2031 dwelling propensity projections presented in *MGP's Response*. The first chart in Attachment K shows the projected change in dwelling propensities by age of household maintainer between 2006 and 2031 used in the *MGP's Response*. Charts comparing the differences in actual propensity changes from 1981 and 2006, and projected changes from 2006 to 2031 used in the *City's Strategy* and *MGP's Response* are also provided in Attachment K.

Issue 6 Are the proposed housing mix and minimum density provisions within OPA 76 for residential development within the urban boundary appropriate and reasonable to accommodate the projected growth?

Housing Mix and Net Residential Density

49. In our opinion, the proposed housing mix and minimum density provisions within OPA 76 should not be used for the purposes of determining land requirements to 2031 as they do not reflect the mix and densities that we believe will be developed (as opposed to what may be planned) over the planning period. Our opinion is based upon a review of Ottawa's existing suburban housing mix and densities, the mix and densities achieved on Greenfields developed since 1995, and our assumptions regarding the housing mix and densities that will be achieved on Greenfield land by 2031.
50. The City's 2005 *Land Use Survey* provides details on the use of land across the City of Ottawa. Among other things, it summarized suburban densities. In 2005, in Ottawa's Suburban Centres, single-detached units represented 59.3% of households and had a density of 16.5 households per net hectare. Total residential densities in suburban centres were calculated at 21.8 households per net hectare.
51. Results from the City's Vacant Urban Residential Land Surveys from 1995 to 2009 show that the proposed housing mix and minimum density provisions within OPA 76 do not reflect what has actually been built on vacant land (which includes land inside the Greenbelt). As shown in Attachment L, in years where higher total residential densities have been achieved, the proportion of singles represented less than the OPA76 provision of 45% would permit.
52. The housing mix and residential density assumptions used in *MGP's Response* are based on what we believe to be appropriate and reasonable Greenfield housing mix and development density assumptions that reflect a shift to higher density suburban development.
53. For the purposes of this witness statement, we have prepared an alternative analysis using the proposed housing mix and minimum density provisions from OPA 76 along with all other assumptions used in *MGP's Response Update*. Using these assumptions, the requirements for urban boundary expansion to 2031 would be 2,172.9 gross hectares. The results of this analysis are presented in Attachment F.

Gross Residential Density

54. While OPA 76 does not include provisions for gross residential densities, the *City's Strategy* concludes that an 851.4 gross hectare expansion is required by assuming a net-to-gross ratio of 50%. This is based on the City's assumption that only a small, incremental expansion is required to accommodate growth to 2031.
55. The residential land requirement to 2031 in *MGP's Response* is based on a net-to-gross ratio of 45%, which we believe appropriately reflects the requirement to plan for a complete community.
56. For the purposes of this witness statement, we have prepared an alternative analysis using the net-to-gross assumption of 50% used in the *City's Strategy* along with all other assumptions used in *MGP's Response Update*. Using these assumptions, the requirements for urban boundary expansion to 2031 would be 2,256.8 gross hectares. The results of this analysis are presented in Attachment G.
57. For the purposes of this witness statement, we have prepared a further alternative analysis using the proposed housing mix and minimum density provisions from OPA 76 and the net-to-gross assumption

of 50% used in the *City's Strategy* along with all other assumptions used in *MGP's Response Update*. Using these assumptions, the requirements for urban boundary expansion to 2031 would be 1,955.6 gross hectares. The results of this analysis are presented in Attachment H.

Issue 7 Are the proposed intensification and density targets within OPA 76 appropriate and consistent with the 2005 Provincial Policy Statement?

58. In our opinion, the proposed city-wide 40% intensification target between 2006 and 2031 is not reasonable or attainable. Our opinion is based on a review of past rates of intensification and our expectations of the demand for high density units in Ottawa between 2006 and 2031.
59. The *City's Strategy* explains, "A minimum target for intensification should be based on an understanding of how much intensification has been taking place in recent years and express the City's objectives for the future," (page 24). In our opinion, the City's assumptions regarding past rates of intensification in the urban area should not be used as the benchmark for establishing a new city-wide target. We will provide evidence to demonstrate that rates of intensification are overstated in the *City's Strategy* and in the *City's 2009 Annual Development Report* because:
 - a. Data showing lower rates of intensification from 1998 to mid-2001 are excluded (26% to 27%);
 - b. Student residences are counted as intensification units; and,
 - c. The methodology for measuring intensification is inconsistent.
60. Our opinion on Ottawa's 1998 to 2009 rates of intensification is presented in Attachment M. The results are based on correspondence that we have had with the City in preparation for this OMB Hearing and on a methodology for measuring intensification agreed to by the City/GOHBA Working Group in May 2008. This matter is described in further detail in Issue 8.
61. The city-wide target is predicated on the City's assumption that there will be a significant shift in the preference for apartments over the planning period. In response to Issue 5, we will provide evidence to support our opinion that the propensity assumptions used by the City were not reasonable or defensible.
62. In so far as the 2005 PPS policy 4.5 states that, "Municipal official plans shall provide clear, reasonable and attainable policies ...", it is our opinion that the intensification target within OPA 76 are not consistent with the 2005 PPS.

Issue 8 Is the proposed requirement in policy 3E in Section 2.2.1 that "an urban expansion will only be considered if the intensification target of this plan has been met" consistent with the 2005 Provincial Policy Statement, in conformity with other policies in the City of Ottawa Official Plan, and does it represent good planning?

63. We will provide evidence in the form of correspondence and handouts between members of the City/GOHBA Working Group to demonstrate that Ms. Heydorn, GOHBA, and the City worked extensively to quantify past rates of intensification and to develop an approach to measure future rates of intensification. We will show that despite the general agreement (there was no agreement on the treatment of student and retirement residences) made by the City/GOHBA Working Group in May 2008 on an approach for measuring intensification for 2007 and future years (Attachment N), the City announced a change in approach in October 2008 upon the circulation of the *City's Preliminary Draft Residential Land Strategy for Ottawa 2006-2031* and again in November 2010 upon the circulation of intensification details presented in the *2009 Annual Development Report*.

64. OPA 76's intensification policies apply to the 2006-2031 planning period while residential land supply has a 15-year planning period, which ends in 2024 if one accepts the City's assumption that the 15-year period is to be calculated from 2009. Based on the *City's Strategy*, an average intensification rate of 39% is assumed to occur between 2006 and 2024. In our opinion, an average intensification rate of 27.8% is more likely to be achieved between 2006-2024.
65. In our opinion, the proposed policy that "an urban expansion will only be considered if the intensification target of this plan has been met" is inconsistent with the 2005 PPS. In our opinion, the intensification target is not reasonable or attainable; therefore, policies that tie the consideration of future urban boundary expansion to the achievement of the intensification target would pose risks to, among other things, Ottawa's affordability and long-term economic prosperity.

Issue 10 Is the decision to add 230 hectares of land to the City's urban boundary consistent with the 2005 Provincial Policy Statement, in conformity with the City's Official Plan, and does it represent good planning?

66. For the reasons that follow, the decision to add 230 hectares of land to the City's urban boundary is not consistent with the 2005 PPS.
 - a. 2005 PPS policy 1.1.2 requires municipalities to provide land to meet the projected needs for a time horizon of up to 20 years. In this case, the planning horizon in OPA 76 is 2031. As the *MGP's Response Update* land requirements analysis (Attachment D) indicates, the supply of available and designated low density (singles and semis) residential land will be exhausted by 2022. (In reality, this theoretical maximum could never be reached due to market failures resulting from a constrained land supply). The decision to add 230 hectares to the urban boundary fails to meet the requirements of the PPS.
 - b. PPS policy 1.4.1 requires municipalities to maintain at all times the ability to accommodate residential growth for a minimum of 10 years. In our opinion, additional lands must be brought into Ottawa's urban area now to satisfy the PPS requirement by 2012.
67. Even if one were to accept City Council's decision to, "... accommodate a 15- year supply of land for residential purposes, ...", and calculate the 15-year period from 2009, 2024 is the time horizon for residential land. Our updated land requirements analysis demonstrates that a total of about 490 gross hectares of residential land will be required by 2024. Consequently, the decision to add 230 hectares for a 15-year supply fails to meet Council's requirement.

Issue 11 Does OPA 76 add sufficient land within the City of Ottawa's Urban Area to meet projected residential/housing needs for the City and, if not, how much land should be added to the Urban Area to meet projected residential/housing needs?

68. In our opinion, OPA 76 does not add sufficient land within the City of Ottawa's Urban Area to meet projected residential/housing needs of the City.
69. Based on *MGP's Response Update*, a total of 2,507.5 gross hectares should be added to the urban area to meet projected residential/housing needs to the 2031 planning horizon.



L. Lee Parsons, P.Eng, MCIP, RPP
Partner
Malone Given Parsons Ltd.

December 3, 2010

Date



Christina Heydorn, MCIP, RPP, PLE
Senior Project Manager
Malone Given Parsons Ltd.

December 3, 2010

Date

EDUCATION

- 1970 Bachelor of Engineering, Dalhousie University
- 1974 Masters in Environmental Studies (Regional Economics), York University
- 2009 ICD Program, Rotman School of Management, University of Toronto

RELEVANT EXPERIENCE

Mr. Parsons is a professional urban planner, economist and engineer with over 30 years of consulting experience. He is a founding partner of the firm responsible for managing urban planning, economic, and development studies for a range of projects in Canada and internationally. His experience includes:

- Transportation policy and planning;
- Risk management;
- Corporate strategic planning;
- Project management;
- Economic impact analysis;
- Municipal and regional planning;
- Strategic planning and development plans for large urban areas and new towns;
- Commercial planning policies;
- Market analysis for retail, office, entertainment, hotel, industrial, residential and tourism projects;
- Master planning for large scale residential, commercial, and downtown redevelopment projects;
- Financial feasibility studies; acquisitions, and project financing alternatives; industrial location studies; residential intensification; municipal finance; private public partnerships; and economic impact; and,
- Program and project impact evaluation.

He is often asked to speak at symposia and conferences on town planning, regional planning, tourism, market analysis and economic development. Mr. Parsons has chaired and participated in many public meetings, has led public and corporate workshops, and has been the spokesman for many studies and projects. He has provided expert testimony before the Ontario Municipal Board on matters related to commercial markets, planning and development.

PROFESSIONAL BACKGROUND

Present	Malone Given Parsons Ltd. <i>Partner</i>	2006 to 2009	GO Transit <i>Director</i>
	MGP Information Systems Ltd. <i>President</i>		<i>Chair, Risk Management</i>
		Present	Metrolinx Committee <i>Director</i>
			<i>Member, Audit, Finance and Risk Committee</i>
		Present	Sauder Industries <i>Director</i>
			<i>Member, Compensation Committee</i>

ASSOCIATIONS AND MEMBERSHIPS

Professional Engineers of Ontario
Canadian Institute of Planners
Ontario Professional Planners Institute
Ontario Land Economists
Urban & Regional Information Systems Association
Canadian Institute of International Studies
Lambda Alpha
International Council of Shopping Centres
Urban Land Institute
Institute of Corporate Directors

RELEVANT PROJECTS

New Brunswick Department of Commerce and Development

A Downtown Redevelopment Feasibility Study for the CBD of Bathurst, New Brunswick. Markets were analyzed and a hotel project proposed. A financial analysis of the project was carried out and the public cost benefit of government subsidy was determined.

New Brunswick

Department of Commerce and Development Project Manager for a Downtown Commercial Redevelopment Project for Fredericton, New Brunswick. Responsible for an assessment of development costs, market potential for each of the proposed uses, and a financial analysis of the project. The project included retail, office use and a hotel/convention centre.

City of St. John's, Newfoundland

Preparation of a Downtown Development Strategy and Marketing Plan to guide the future direction for the Downtown of St. John's, to identify tenant opportunities to outline a marketing strategy and provide a clear plan of action for the City and the BIA.

Economic Opportunity at the Corel Centre

This study assessed the opportunity for economic growth in the western part of the City of Ottawa. The recommended strategy was to create a major new employment node for approximately 20,000 jobs in western Ottawa that would include a large technology oriented business campus, and regionally oriented leisure sport and entertainment land uses.

Durham Regional Economic Development Advisory Committee

Prepared an Economic Plan for the Millennium to guide economic development activities in the Region for the next five to ten years. The study included preparation of a comprehensive Baseline Profile of the Region's economy and demography, and drew extensively on consultation with the business and broader

communities in identifying and prioritizing issues and defining a plan of action

Saint John, New Brunswick

The Saint John Development Corporation retained MGP to prepare a strategy to guide the future development of the Saint John Waterfront. The objective of this assignment was to balance the needs of the port with those of the adjacent downtown, residential areas, and tourists. The strategy implemented policies that were designed to protect and enhance the economic viability of the port, reduce land use conflicts, optimize public access and uses of the waterfront, strengthen the Uptown as the commercial centre of the City, promote the waterfront as a tourism focus, preserve and interpret the waterfront's culture history and enhance the quality of the waterfront environment. The study involved detailed land use surveys, economic analysis, tourism market analysis, historic and cultural planning, architecture, environmental planning, infrastructure and public consultation. Several agencies have jurisdiction over planning and development of waterfront lands which are the prime location for hotels, tourist attractions, and new employment. The strategic plan will guide development over the next decade.

City of Owen Sound Harbour and Downtown Urban Design and Master Plan Strategy

The Consulting Team and Committee were established to undertake an Urban Design and Master Plan Strategy for the Owen Sound Harbour. The main objectives of the project were: To integrate and rationalize re-development potential and public infrastructure in the downtown and harbor area; To establish the right type and mix of activities, development and infrastructure to reinforce Owen Sound's position as a regional centre; And to build the community vision and produce a master plan document to guide the design and implementation of physical improvement over time.

Government of Nova Scotia, Department of Development

Retail Policy of the Halifax Dartmouth Region. This project also included an analysis of the current and future retail markets in the Region and outlined a retail policy which will produce a balanced hierarchy of retail floor space serving the needs of the Region.

Government of Nova Scotia, Department of Development

Future Office Requirements and Development Policy for the Halifax Dartmouth Region. This study involved a detailed assessment of the factors affecting demand for office space, tenant mix, and location. A forecast of future space and locational requirements was used to form the basis of a development policy.

Times Developments Inc.: Market Feasibility Study for a 700,000 sq.ft. urban entertainment centre and theme retail commercial, office and residential complex in south York Region.

Canada's Wonderland

Market Opportunity, Development Concept, and Financial Feasibility for developing a major commercial complex at Major Mackenzie and Highway 404 in the Town of Vaughan. This project will involve development on part of the Canada's Wonderland site to create a major City Centre complex with recreation, entertainment, shopping, office, residential and hotel facilities totaling 7.0 million s.f.

Toronto Economic Development Corporation

The Industrial Economic Feasibility and Marketing Plan for the industrial areas within south east Toronto and the port lands. This study involved a detailed analysis of the locational strengths and weaknesses of the south east Toronto area, a detailed survey of over 30 firms, an assessment of what industries can be attracted to the area, and the strategies and action required to attract them

Niagara Economic and Tourism Corporation

Investment prospectuses for five large-scale economic development projects in Niagara Region at Fort Erie, Port Colborne, St. Catharines, and Niagara Falls.

Metrolinx

Lee became a Director of Metrolinx in 2009 when Go Transit was merged with the old Metrolinx. Currently a member of the Board's Audit, Finance and Risk Management Committee, which oversees the audit and management work on internal control and risk assessment. The Committee is also responsible for providing the Board with management oversight and recommendations on transit financing. Through Board work with Go Transit and Metrolinx, Lee participated in two Strategic Plans and four updates

GO Transit

A director of GO Transit from 2006 to 2009 providing input and oversight on strategic planning, budgeting, operations, land acquisition and transportation technology. As chair of the Board's Risk Management Committee, Lee oversaw the development of an Enterprise Risk Management System and coordinated the Board's assessment of risk.

Oshawa Harbour

MGP were the lead consultant on the strategic study and Master Plan for the long term use of Oshawa Harbour. The first phase of the study analyzed many complex issues, including overlapping jurisdictions, conflicting objectives, contaminated soils and sediments, regional needs and market opportunities, significant environmental features, and the economic role of the Harbour. Four alternative plans were assessed on economic and environmental criteria. A mixed use option was selected which maintained the port while promoting recreational, cultural and residential uses. The plan also enabled transformation of the active port lands into a regional recreational/cultural destination in the event an alternative port location was to be developed. The study received the Ontario Professional Planners Institute Communications Award. A second phase of the study developed an urban design vision and development guidelines for the Harbour. This phase is using leading-edge GIS and 3D computer modeling to develop and communicate the design vision for the Harbour.

Downtown Analysis of 18 Communities

This study carried out with two other planning firms (Bousfields Inc. & Macaulay Shiomi Howson) examined the structure, function, and health of downtowns in 18 communities that have large power centres. The case study communities were: Barrie, Belleville, Brantford, Cambridge, Chatham, Cornwall, Kingston, Kitchener, New Liskeard, North Bay, Owen Sound, Peterborough, Sarnia, St. Catherines, Sudbury, Thunder Bay, Timmins, and Windsor.

Subiya New Town Development Plan, Kuwait

Lead MGP in the preparation of a demographic, economic and housing analyses, a land use strategy, implementation plan and financial analyses, as part of a Master Plan for Subiya New Town in Kuwait. MGP was also responsible for creating a geophysics information system for the master plan. The international consulting team that prepared the Master Plan for this new city of 400,000 people also included detailed transportation planning, engineering, urban design, design guidelines and controls, marine engineering, environmental assessment and planning.

Bubiyan Island Environmental Assessment and Master Plan, Kuwait

This complex project involved a multidisciplinary team of international consultants to carry out a detailed environmental assessment and master development plan for this 930 square kilometre island in the Arabian Gulf. This environmentally sensitive area is a potential RAMSAR site. The objective was to facilitate sustainable development that would minimize environmental impacts. In addition to the environmental reserves, the master plan included a new port, a free trade zone, 11,000 housing units, and ten resort hotels. MGP's role was to conduct market studies, economic studies, identify a land use development strategy that would meet economic and environmental criteria, create a detailed implementation plan, and a financial analysis of the \$9 billion development program and individual project elements.

Al Ain Industrial City Master Plan, Abu Dhabi

The objective was to plan, design, and develop a new industrial city adjacent to the existing Al Ain City in Abu Dhabi. The Plan provides a complete range of urban services, town centre, hotels, conference facilities, residential development, schools, college, and will be a major employment centre for approximately 20,000 jobs and 40,000-50,000 people. MGP was responsible for the economic assessment master plan, detailed land use planning, development standards, and financial analysis of the project.

City of Brampton

City Hall Expansion. Assessment of opportunity for non-municipal commercial uses and development of a tenancing strategy for the proposed development of a second building to accommodate an expansion of the City's municipal offices.

City of Brampton

Comprehensive commercial policy review study and assessment of market demand and opportunity for the City of Brampton to 2031. The study included extensive field research, data collection, customer origin and consumer surveys. Recommendations were provided regarding Official Plan retail policies and the hierarchy of policies with particular emphasis on the downtown area in response to current and emerging trends in retailing and market demand.

The Town of Cobourg

MGP was retained by the Town of Cobourg to carry out a market demand and impact analysis as part of a Secondary Plan process for a mixed-use employment, commercial development area including a large format retail centre in the Town. The purpose of this study was to determine how much new commercial space, if any, could be located within the Secondary Plan Area without negatively affecting the viability and planned commercial functions of commercial nodes in Cobourg, in particular the Main Central Area

Town of Hanover

Commercial Strategy Study to provide an appropriate commercial structure for the Town which meets the needs of residents and protects the downtown.

Town of Collingwood

MGP is the ongoing planning consultant for the Town of Collingwood. We advise on commercial policy and on commercial applications and approvals. More recently, MGP conducted a Commercial Policy Study included a retail market analysis and planning policy exercise. The work included in depth research into the seasonal and permanent population base of the Town and its diverse impact on retail commercial services provided. MGP is also in the process of compiling future urban design guidelines for the Town.

Richcraft Group of Companies

Provide a perspective on the requirements of a new growth management strategy for the City of Ottawa. The study considered policy directions; population and employment growth; urban structure; the available vacant land supply; environmental, agricultural and geotechnical factors; transportation; and water distribution and sewer services. The result was a strategic assessment that considered land requirements.

Hudson's Bay Company

Shanghai Market Opportunity and Strategy Study analyzed the current structure of department store retailing in Shanghai, analyzed expenditure patterns of residents, identified the market potential for new department stores, analyzed the operating and finance requirements, identified potential sites and analyzed development economics.

Bonne Bay Regional Development Strategy and Community Plans for Six Communities

This area surrounds the 1800 square kilometre Gros Morne National Park in Newfoundland. This park is a UNESCO World Heritage site and contains some of the most unique land forms and scenery in Canada. The objective of the assignment is to create a strategy which diversifies the tourism market and yet focus on the high yield low impact international eco tourist/adventure tourist market. The assignment involves detailed analysis of the international tourism market, environmental analysis, population and demographics, infrastructure analysis, land use, housing, marine structures and infrastructure. The project involves an extensive public consultation program and will conclude with detailed Community Development Plans.

Niagara Falls Comprehensive Tourism Master Plan

Niagara Falls, Canada, is one of the world's major tourist attractions, which was visited by over 12 million visitors annually. Niagara Falls has benefited significantly from tourism but has also suffered as a community due to overwhelming tourist development. The objective of this study was to create a long term plan to upgrade the quality of the urban environment and to ameliorate the undesirable legacy of over a century of intensive tourist development.

Toronto Eaton Centre

A study of the tourist market to the Eaton Centre which currently exceeds 8 million visitors annually. This included an assessment of market segments, tourist expectations, expenditure patterns, the contribution of tourist expenditures to sales, and strategies for improving penetration of Toronto's tourist market.

National Capital Commission

A Feasibility Study for a major theme cultural/tourism development on Victoria Island in the Capital Region. The study involved assessment of visitor potential, an evaluation of development concepts, and recommendation of management structures.

National Capital Commission

Development of a Property Evaluation Procedure and Strategic Management Plan for over 100,000 acres in the Ottawa/Hull Capital Region. This included: establishing property management goals for the NCC; defining criteria for evaluating alternatives; outlining specific management procedures and responsibilities.

City of Toronto (East York)

Residential Intensification Study involves a detailed analysis of site opportunities for residential development and redevelopment, an investigation of opportunities for innovative housing design, a comprehensive process of public consultation, the definition of an intensification strategy and the regulatory framework required for implementation.

Canadian Urban Institute/City of Toronto

At the Transit City Symposium in 2009, Lee chaired a half day session on Place Making and Transit Oriented Development with experts from New York City, Seattle, Chicago and Paris.

Urban Land Institute

Organized and chaired a Toronto symposium on transit oriented development that was attended by politicians, municipal officials, developers, bankers, architects, engineers and planning consultants.

Sauder Industries

A director of the family holding company for Sauder Industries (Elswood Investments) a private wood products firm based in Vancouver with manufacturing plants and distribution facilities across Canada and the United States. He is also a member of the Compensation Committee that dealt with succession planning and human resources. Lee also is involved at the Board level in Strategic Planning for the company.

City of Toronto

Advised the City on high density residential and office development with direct subway access within North York Centre.

Attachment B



Christina Heydorn, MA, MCIP, RPP, PLE
Senior Project Manager

EDUCATION

- 2007 Master of Arts (Planning),
School of Planning, Faculty of Environmental Studies, University of Waterloo
- 2001 Honours Bachelor of Environmental Studies (Geography),
Faculty of Environmental Studies, University of Waterloo
- 2001 Certificate of Excellence in Geographic Information Systems,
Faculty of Environmental Studies, University of Waterloo

RELEVANT EXPERIENCE

Ms. Heydorn's expertise is in providing leadership and sharing technical knowledge in a Senior Project Manager capacity and developing and maintaining effective working relationships with clients and project team members. She has been responsible for overseeing and contributing to: growth management strategies; social, economic, and demographic analyses; industrial, residential, and commercial land requirement analyses; policy formulation; and project feasibility studies.

Ms. Heydorn's technical experience includes monitoring residential, commercial and industrial sector development and policy trends; undertaking commercial space and industrial land inventories, often employing the use of GIS technologies; assessing existing commercial, residential and industrial land use conditions and defining future needs based on growth expectation; reviewing and preparing growth forecasts; assessing and recommending strategic Municipal Plan and Zoning By-law policy modifications; and, preparing strategic and economic analyses. She has been involved in managing, preparing and presenting high profile master planning and growth management exercises in Ontario and in the Middle East.

ASSOCIATIONS

Member of the Canadian Institute of Planners
Member of the Ontario Professional Planners Institute
Member of the Association of Ontario Land Economists

INVITED PRESENTATIONS

- May 2009 *Ottawa's Residential Land Needs: Response to the City of Ottawa's Residential Land Strategy*
Urban Council, Canadian Home Builders' Association

RELEVANT PROJECTS

City of Ottawa Official Plan Review, Ottawa

MGP was retained by the Greater Ottawa Home Builders' Association to act as their consultant during the City of Ottawa's five-year Official Plan review process. Ms. Heydorn's tasks included the participation in discussions with City planning staff concerning growth projections and pressures, land requirements, intensification opportunities, and planning policy directions for the Official Plan.

Managing Growth, City of Ottawa, Ottawa

MGP was retained by Richcraft Group of Companies to lead a team of consultants to provide advice assess new locations to best accommodate future growth over 20 and 50 year time-frames. A comprehensive review of lands surrounding the existing urban area and Greenbelt was undertaken. Ms. Heydorn was the project manager for this study and oversaw the process of identifying the quantity and location of additional urban land requirements based on the calculation of the existing supply of vacant residential and employment land; preparation of household projections over the forecast period by unit type; preparation of employment projections by employment type; estimation of gross land requirements netting out environmentally significant features; considering the protection of prime agricultural land; and, considering additional development opportunities and constraints based on transportation, infrastructure, and geotechnical factors.

Choices for Housing in the City of Ottawa: Response to the Where Will We Live? Report, Ottawa

Critique of a City of Ottawa residential land supply analysis focused on redevelopment, intensification, and infill opportunities in the existing urban area. MGP's assessment included a critique of the City's methodology and results and presented an alternative supply and demand analysis of residential land needs. It concluded that the City must engage immediately in a proactive growth management strategy that would more effectively link infrastructure investment, incentives and partnership programs to support the municipality's intensification efforts.

City of Ottawa: Employment Land Needs Assessment, Ottawa

MGP carried out an assessment of the long term supply and demand for employment land in the City of Ottawa. The process involved the allocation of the city's employment projections to three employment categories (population serving, office, and industrial), the creation of employment density assumptions for each category, and the assessment of employment land supply by employment category. Ms. Heydorn was responsible for research, analysis, and report writing.

Commercial Peer Review, City of Ottawa

MGP was retained by the City of Ottawa to carry out a peer review in order to examine and provide the City with advice on the validity of a market study's results and findings regarding the anticipated impact of a proposed Costco Warehouse Membership Club on existing retail nodes. Ms. Heydorn was responsible for research, analysis, and report writing.

Development Opportunity and Needs in Stittsville, Ottawa

MGP was retained by Taggart Residential Developments Ltd. to conduct a development opportunity and needs study for a proposed residential and commercial development in Stittsville. The study's three objectives were: to assess the need for additional residential land in Stittsville; to assess the opportunity for commercial development along the Hazeldean Road frontage; and to assess any planning implications of removing the lands from their current employment designation. Ms. Heydorn was responsible for research, analysis, and report writing.

Property Information Reports, Ottawa

MGP a multidisciplinary consulting team retained to assess the attributes and development potential of 17 Richcraft Group of Companies' properties located outside of the City of Ottawa urban boundary. The intent was to provide a description of the property; a general review of urban structure, transportation, infrastructure, environmental, agricultural, and geotechnical factors that may influence development potential; and, identify each property's potential for accommodating future development in the short, medium, and long term. Ms. Heydorn was the project manager and coordinated the analysis and oversaw report development and production.

Growth Management Strategy, County of Grey

MGP was retained to prepare a Growth Management Strategy to inform the County's Official Plan review. Ms. Heydorn was the Project Manager and was responsible for overseeing the preparation of growth projections; carrying out a land supply and demand analysis based on the establishment of intensification targets, development densities, natural and agricultural constraints, and community buy-in. In the context of provincial policy, she also helped in the preparation of draft implementing Official Plan policies.

Bubiyah Island Environmental Assessment and Master Plan, Kuwait

This project involved a multidisciplinary team of international consultants to carry out a detailed environmental assessment and master development plan for this 930 square kilometre island in the Arabian Gulf. MGP's role was to conduct market studies, economic studies, and identify a land use development strategy that would meet economic and environmental criteria, create an implementation plan, and prepare a financial analysis of the development program and individual project elements. Ms. Heydorn was responsible for the assessment of the existing residential, commercial, employment, tourist, and hotel markets in Kuwait; defining the national and local economic and socio-demographic context for planning and development; identifying economic development opportunities; projecting population, employment, and housing targets; defining the land development strategy; developing the general land use schedule that balances urban development with environmental protection efforts; and, identifying the phasing of development.

Mirdif Gate Master Plan, United Arab Emirates

A Master Plan for a community of 10,000 expatriate residents in Dubai, United Arab Emirates. The report included the collection and analysis of demographic data, planned and proposed surrounding land use information, and site characteristics.

Subiya New Town Development Plan, Kuwait

Kuwait municipality engaged a multi-disciplinary team of international consultants to review and update Subiya New Town's outdated 1990 Master Plan in the context of the current political, economic and social climate. MGP contributed to all

components of the Master Plan update including: preparing a demographic, economic and housing analyses, a land use strategy, implementation plan and financial analyses. Ms. Heydorn was responsible for the review of the allocation of population and employment to the new town based on the country's economic development objectives; projected residential unit type requirements; projected employment by employment type; and calculated residential, employment, commercial, institutional and other land use land requirements based on typical urban densities.

Markham's Employment Land Needs and The Role of Leitchcroft, Markham

MGP conducted a needs analysis of vacant employment land in Markham by employment land use category for the purpose of Official Plan and Zoning By-law amendments. This involved the review of municipal and regional employment forecasts by employment type, analysis of municipal employment land forecasts, update of vacant employment land inventory, and analysis of employment land supply/demand balance. Ms. Heydorn was responsible for completing the land inventory, other research, analysis, and report writing.

Location Opportunities Along the Mid-Peninsula Transportation Corridor: Ontario, South Western Ontario

Recommended land acquisition alternatives for a commercial development along the proposed Mid-Peninsula Transportation Corridor. Recommendations were based on an understanding of the potential, need, alignment, timing, funding and economic development drivers of the infrastructure project.

City of Brampton Downtown Retail-Service Analysis Update, Brampton

MGP carried out a comprehensive market opportunity assessment, tenancing strategy, and economic development opportunities and benefits analysis that will guide decisions regarding the commercial component of a proposed mixed-use City Hall addition. Ms. Heydorn was the project manager on this assignment and directed all research components and analysis.

Markham Centre Retail Strategy, Markham

MGP is currently carrying out a comprehensive market opportunity assessment for Uptown Markham Centre for the purpose of defining opportunities for retail and service commercial uses by commercial category and built form. Ms. Heydorn is the project manager assigned for this assignment.

City of London Review of Commercial Supply and Demand, London

MGP carried out a commercial inventory and market assessment of the City of London in order to provide an understanding of the municipality's existing and future retail and service commercial environment, planned commercial functions, commercial performance, and future commercial needs.

Market Assessment and Strategic Options: Windsor Crossing & The Windsor Essex Parkway; LaSalle

MGP carried out a market assessment and strategic options study to examine the future economic viability and commercial function of Windsor Crossing Outlet Mall in light of the development of the Windsor-Essex Parkway. The assessment is intended to provide an understanding of the commercial market context and recommend economically viable alternative development schemes to inform the investment decisions of the Mall's owners and investors. Ms. Heydorn was the project manager for this assignment.

Commercial Market Feasibility and Impact Study: Cookstown Outlet Mall Expansion, Innisfil

A commercial market feasibility and impact study of a proposed 191,000 sq.ft. expansion to the existing Cookstown Outlet Mall at Highway 400 and Highway 89 in the Town of Innisfil. Study components included a review of the outlet mall format, customer intercept surveys, growth projections and a demand analysis. It concluded that Cookstown Outlet Mall is a unique commercial centre that has little competitive effects on other Innisfil commercial facilities and that the proposed expansion, because of its differentiated market focus, would not compromise the planned function of other commercial designations.

Market Demand and Impact Analysis: Woolwich, Woolwich

A market demand and impact analysis of a proposed 440,000 sq.ft. Wal-Mart anchored retail and service commercial centre at Victoria Street North and Ebycrest Road the Township of Woolwich. Study components included a commercial inventory, review of existing and proposed competitive space, customer origin and customer spending surveys, and demand and impact analyses. Ms. Heydorn was the project manager and the study's lead author.

Market Review and Opportunity Study: Oxford Street West and Westdel Bourne, London

A market opinion on and recommendations for the size, tenant mix, and distribution of a mix of commercial, institutional, office, and entertainment uses at Oxford Street West and Westdel Bourne in the City of London. The focus of the research and analysis was based on the client's interest in developing a highly designed commercial centre reflective of the surrounding residential community. The study considered the most recent shopping centre and design trends across North America, including: consideration of a mix of retail, entertainment, and service uses; safe pedestrian access; appropriate parking opportunities; and alternative landscaping and buffering options.

Various Private Clients

Various market opportunity and impact studies regarding proposed commercial development ranging in scale from small convenience plazas to large regional shopping centres, big box retail, warehouse membership clubs, retail warehouses, supermarket and department stores in various municipalities throughout the Greater Toronto Area and Ontario.

Maitland Falls Resort Recreational Vehicle Park Opportunity Study, Central Huron

A demand study for a new recreational vehicle park development near Highway 8 and Falls Road in the Municipality of Central Huron. The analysis assessed the demand for a recreational vehicle park on the site and took into consideration demand trends, traveler characteristics, and supply. It was concluded that the site is an attractive location for a recreational vehicle park, for which there is demand, and its development could contribute to the improvement of tourist infrastructure in the region.

Attachment C
Errata to *MGP's Response*
Urban Area Land Requirement to 2031

In March 2009, Ms. Heydorn and Mr. Parsons authored a report entitled *Ottawa's Residential Land Needs, Response to the City of Ottawa's Residential Land Strategy* ("*MGP's Response*").

In preparation for the impending OMB hearing, we reviewed our March 2009 analysis and recognize that there were minor errors in our dwelling demand calculations which were associated with the accounting of ownership and rental vacancy factors for townhouses and apartments. We also recognize that the 2011 demand for singles was incorrectly stated. We have made the corrections and note that the differences in results are negligible and therefore do not impact the conclusions presented in *MGP's Response*.

The following changes should be made to *MGP's Response*:

- The last three bullet points on page A-8 of *MGP's Response* should read:
 - 3% rental vacancy for 25% of apartments between 2006 and 2020, which are assumed to be rented;
 - 0.5% rental vacancy for 60% of apartments between 2021 and 2030, which are assumed to be owned; and,
 - 3% rental vacancy for 40% of apartments between 2021 and 2030, which are assumed to be rented.
- The data in the following table replaces the housing requirement and urban area land requirement tables in the *MGP Response*.

Replacement for MGP's Response Ottawa's Housing Requirements, Residential Land Requirements and Analysis Comparison Tables

		Malone Given Parsons Ltd.					Residential Land Strategy				
		Single	Semi	Town	Apartment	Total	Single	Semi	Town	Apartment	Total
Housing Requirements	Housing Requirements, 2006 to 2031	68,940	7,790	39,330	31,340	147,400	59,100	7,260	39,450	41,730	147,540
	<i>Proportion of Private Household Requirements, 2006 to 2031</i>	<i>46.8%</i>	<i>5.3%</i>	<i>26.7%</i>	<i>21.3%</i>	<i>100.0%</i>	<i>40.1%</i>	<i>4.9%</i>	<i>26.7%</i>	<i>28.3%</i>	<i>100.0%</i>
Proportion Allocated to Rural Area	Proportion of Housing Allocated to Rural Area, 2006 to 2031	94%	1%	4%	1%	9%	94%	1%	4%	1%	9%
	Rural Area Housing Requirements, 2006 to 2031	12,470	130	530	130	13,270	12,480	130	530	130	13,280
	Urban Area Housing Requirements, 2006 to 2031	56,470	7,660	38,800	31,210	134,130	46,620	7,130	38,920	41,600	134,260
Intensification	Probable Residential Intensification, 2006 to 2031	4,480	1,480	5,190	24,400	35,550	3,220	2,150	10,200	38,130	53,700
	Urban Greenfield Housing Requirements, 2006 to 2031	51,990	6,180	33,610	6,810	98,580	43,400	4,980	28,720	3,470	80,560
Greenfield Unit Supply and Demand Balance	Urban Greenfield Unit Supply, 2006	37,210	3,300	33,400	22,820	96,730	36,660	3,270	36,630	22,460	99,020
	Greenfield Supply and Demand Balance, 2006 to 2031	-14,780	-2,880	-210	16,010	-	-6,740	-1,710	7,910	18,990	-
Provision for Mix	Provision for a Mix of Units	50.2%	9.8%	36.0%	4.0%	100.0%	47.9%	12.1%	36.0%	4.0%	100.0%
	Urban Greenfield Unit Requirements	14,780	2,880	10,590	1,180	29,430	6,740	1,710	5,070	560	14,080
Net Residential Land Requirement	Suburban Development Density (upnh)	23	30	42	100	-	26	34	45	150	-
	Net Residential Land Requirement (net hectares)	642.6	96.0	252.1	11.8	1002.6	259.2	50.3	112.7	3.7	425.9
Gross Developable Urban Land Requirement	Net-to-Gross Ratio	-	-	-	-	45%	-	-	-	-	50%
	Gross Developable Land Requirement (gross hectares)	-	-	-	-	2,227.9	-	-	-	-	851.8

Note: Totals may not add due to rounding.

Source: Assumptions and details of analysis provided in MGP's March 2009 report Ottawa's Residential Land Needs Response to the City of Ottawa's Residential Land Strategy.

Attachment D
MGP's Response Update
Urban Area Land Requirement to 2031
Updated to Reflect Urban Area Residential Land Supply

The joint witness statement of Mr. Feldgaier and Mr. Norman of Altus details the process that was undertaken to update the designated and available residential land supply in the City of Ottawa outside of the Greenbelt as of December 31, 2006.

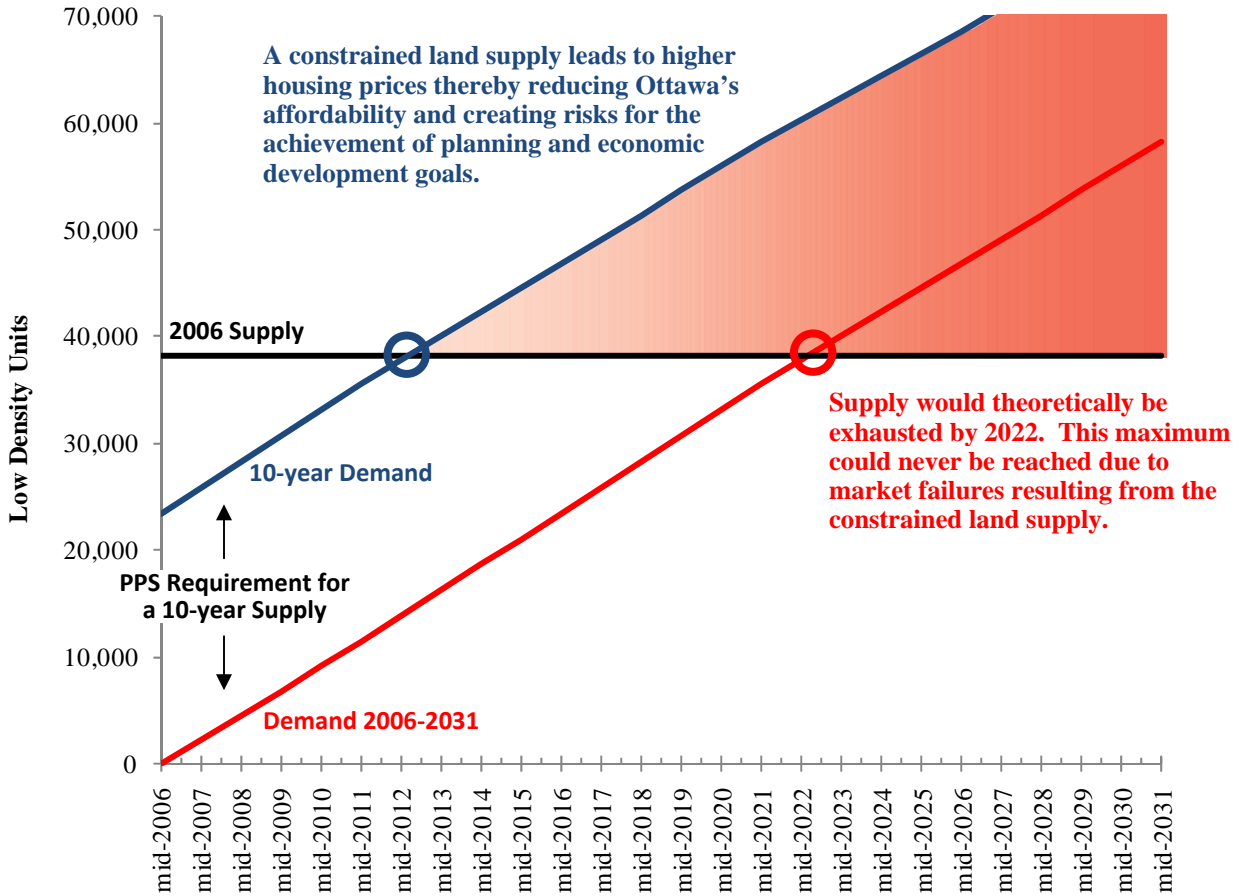
The following table provides an update to *MGP's Response*, herein referred to as *MGP's Response Update*.

		Single	Semi	Town	Apartment	Total
Housing Requirements	Housing Requirements, 2006 to 2031	68,940	7,790	39,330	31,340	147,400
	<i>Proportion of Private Household Requirments, 2006 to 2031</i>	<i>46.8%</i>	<i>5.3%</i>	<i>26.7%</i>	<i>21.3%</i>	<i>100.0%</i>
Proportion Allocated to Rural Area	Proportion of Housing Allocated to Rural Area, 2006 to 2031	94%	1%	4%	1%	9%
	Rural Area Housing Requirements, 2006 to 2031	12,470	130	530	130	13,270
	Urban Area Housing Requirements, 2006 to 2031	56,470	7,660	38,800	31,210	134,130
Intensification	Probable Residential Intensification, 2006 to 2031	4,480	1,480	5,190	24,400	35,550
	Urban Greenfield Housing Requirements, 2006 to 2031	51,990	6,180	33,610	6,810	98,580
Greenfield Unit Supply and Demand Balance	Urban Greenfield Unit Supply, 2006	35,920	2,260	34,550	27,210	99,940
	Greenfield Supply and Demand Balance, 2006 to 2031	-16,070	-3,920	940	20,400	-
Provision for Mix	Provision for a Mix of Units	48.2%	11.8%	36.0%	4.0%	100.0%
	Urban Greenfield Unit Requirements	16,070	3,920	12,000	1,330	33,320
Net Residential Land Requirement	Suburban Development Density (upnh)	23	30	42	100	-
	Net Residential Land Requirement (net hectares)	698.7	130.7	285.7	13.3	1128.4
Gross Developable Urban Land Requirement	Net-to-Gross Ratio	-	-	-	-	45%
	Gross Developable Land Requirement (gross hectares)	-	-	-	-	2,507.5

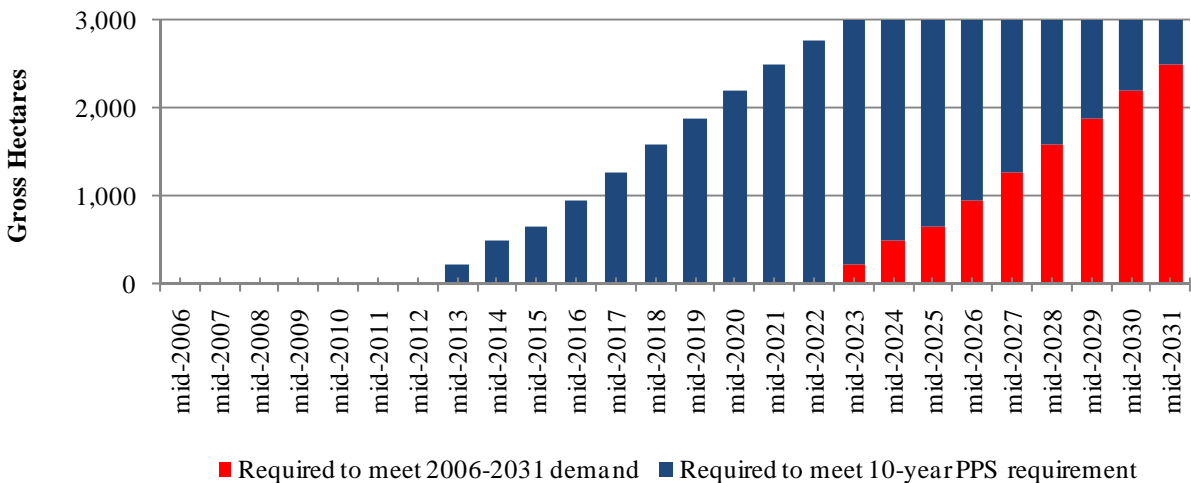
Note: Totals may not add due to rounding.

Source: Urban Greenfield Unit Supply, 2006 from Joint Witness Statement of Mr. Feldgaier and Mr. Norman, City of Ottawa OPA 76 OMB Case No. PL100206 account for units built from July to December 2006. Details of all other assumptions provided in MGP's March 2009 report Ottawa's Residential Land Needs Response to the City of Ottawa's Residential Land Strategy.

Supply and Demand for Low Density (Single and Semi) Units in the City of Ottawa, 2006 to 2031



Requirement for Additional Urban Land in the City of Ottawa, 2006 to 2031
(Absorption plus 10-year Requirement)



Source: Based on the results of the updated land requirement analysis prepared by MGP and presented in Attachment D, MGP Response Update, Urban Area Land Requirement to 2031 Updated to Reflect Urban Area Residential Land Supply.

Attachment E
Urban Area Land Requirement to 2031 with
Ontario Ministry of Finance 2010 Growth Projections

In June 2010, the Ontario Ministry of Finance released new growth projections for the Province and large urban centres which represent the most up-to-date population projections and should be considered.

The following table translates the alternative forecasts into land requirements by 2031.

		Single	Semi	Town	Apartment	Total
Housing Requirements	Housing Requirements, 2006 to 2031	73,270	8,480	40,920	38,210	160,880
	<i>Proportion of Private Household Requirements, 2006 to 2031</i>	45.5%	5.3%	25.4%	23.8%	100.0%
Proportion Allocated to Rural Area	Proportion of Housing Allocated to Rural Area, 2006 to 2031	94%	1%	4%	1%	9%
	Rural Area Housing Requirements, 2006 to 2031	13,610	140	580	140	14,480
	Urban Area Housing Requirements, 2006 to 2031	59,660	8,340	40,340	38,070	146,400
Intensification	Probable Residential Intensification, 2006 to 2031	4,480	1,480	5,190	24,400	35,550
	Urban Greenfield Housing Requirements, 2006 to 2031	55,180	6,860	35,150	13,670	110,850
Greenfield Unit Supply and Demand Balance	Urban Greenfield Unit Supply, 2006	35,920	2,260	34,550	27,210	99,940
	Greenfield Supply and Demand Balance, 2006 to 2031	-19,260	-4,600	-600	13,540	-
Provision for Mix	Provision for a Mix of Units	48.4%	11.6%	36.0%	4.0%	100.0%
	Urban Greenfield Unit Requirements	19,260	4,600	14,320	1,590	39,770
Net Residential Land Requirement	Suburban Development Density (upnh)	23	30	42	100	-
	Net Residential Land Requirement (net hectares)	837.4	153.3	341.0	15.9	1,347.6
Gross Developable Urban Land Requirement	Net-to-Gross Ratio	-	-	-	-	45%
	Gross Developable Land Requirement (gross hectares)	-	-	-	-	2,994.6

Note: Totals may not add due to rounding.

Source: Housing Requirements, 2006 to 2031 are based on final 2006 postcensal population estimates from CANSIM Table 109-5325 and 2031 population projections from the Ontario Ministry of Finance Ontario Population Projections Update 2009 to 2036, released June 2010. Details on all other assumptions are summarized in Attachment D, MGP Response Update, Urban Area Land Requirement to 2031 Updated to Reflect Urban Area Residential Land Supply.

Attachment F
Urban Area Land Requirement to 2031 with
OPA 76 Housing Mix and Density Assumptions

We have prepared an alternative analysis using the proposed housing mix and minimum density provisions from OPA 76 along with all other assumptions used in *MGP's Response Update*.

The following table details Ottawa's urban area land requirements to 2031 using the housing mix and density provisions in OPA 76.

		Single	Semi	Town	Apartment	Total
Housing Requirements	Housing Requirements, 2006 to 2031	68,940	7,790	39,330	31,340	147,400
	<i>Proportion of Private Household Requirements, 2006 to 2031</i>	46.8%	5.3%	26.7%	21.3%	100.0%
Proportion Allocated to Rural Area	Proportion of Housing Allocated to Rural Area, 2006 to 2031	94%	1%	4%	1%	9%
	Rural Area Housing Requirements, 2006 to 2031	12,470	130	530	130	13,270
	Urban Area Housing Requirements, 2006 to 2031	56,470	7,660	38,800	31,210	134,130
Intensification	Probable Residential Intensification, 2006 to 2031	4,480	1,480	5,190	24,400	35,550
	Urban Greenfield Housing Requirements, 2006 to 2031	51,990	6,180	33,610	6,810	98,580
Greenfield Unit Supply and Demand Balance	Urban Greenfield Unit Supply, 2006	35,920	2,260	34,550	27,210	99,940
	Greenfield Supply and Demand Balance, 2006 to 2031	-16,070	-3,920	940	20,400	-
Provision for Mix	Provision for a Mix of Units	48.2%	11.8%	30.0%	10.0%	100.0%
	Urban Greenfield Unit Requirements	16,070	3,920	10,000	3,330	33,320
Net Residential Land Requirement	Suburban Development Density (upnh)	26	34	45	150	-
	Net Residential Land Requirement (net hectares)	618.1	115.3	222.2	22.2	977.8
Gross Developable Urban Land Requirement	Net-to-Gross Ratio	-	-	-	-	45%
	Gross Developable Land Requirement (gross hectares)	-	-	-	-	2,172.9

Note: Totals may not add due to rounding.

Source: Provision for a Mix of Unit and Suburban Development Density based on OPA 76 and the City's assumptions presented in the February 2009 report Residential Land Strategy for Ottawa 2006-2031. Details on all other assumptions are summarized in Attachment D, MGP Response Update, Urban Area Land Requirement to 2031 Updated to Reflect Urban Area Residential Land Supply.

Attachment G
Urban Area Land Requirement to 2031 with
the City's Strategy's Net-to-Gross Assumptions

We have prepared an alternative analysis using the net-to-gross assumption of 50% used in the *City's Strategy* along with all other assumptions used in *MGP's Response Update*.

The following table details Ottawa's urban area land requirements to 2031 using the *City's Strategy* net-to-gross assumption of 50%.

		Single	Semi	Town	Apartment	Total
Housing Requirements	Housing Requirements, 2006 to 2031	68,940	7,790	39,330	31,340	147,400
	<i>Proportion of Private Household Requirements, 2006 to 2031</i>	46.8%	5.3%	26.7%	21.3%	100.0%
Proportion Allocated to Rural Area	Proportion of Housing Allocated to Rural Area, 2006 to 2031	94%	1%	4%	1%	9%
	Rural Area Housing Requirements, 2006 to 2031	12,470	130	530	130	13,270
	Urban Area Housing Requirements, 2006 to 2031	56,470	7,660	38,800	31,210	134,130
Intensification	Probable Residential Intensification, 2006 to 2031	4,480	1,480	5,190	24,400	35,550
	Urban Greenfield Housing Requirements, 2006 to 2031	51,990	6,180	33,610	6,810	98,580
Greenfield Unit Supply and Demand Balance	Urban Greenfield Unit Supply, 2006	35,920	2,260	34,550	27,210	99,940
	Greenfield Supply and Demand Balance, 2006 to 2031	-16,070	-3,920	940	20,400	-
Provision for Mix	Provision for a Mix of Units	48.2%	11.8%	36.0%	4.0%	100.0%
	Urban Greenfield Unit Requirements	16,070	3,920	12,000	1,330	33,320
Net Residential Land Requirement	Suburban Development Density (upnh)	23	30	42	100	-
	Net Residential Land Requirement (net hectares)	698.7	130.7	285.7	13.3	1,128.4
Gross Developable Urban Land Requirement	Net-to-Gross Ratio	-	-	-	-	50%
	Gross Developable Land Requirement (gross hectares)	-	-	-	-	2,256.8

Note: Totals may not add due to rounding.

Source: Net-to-Gross Ratio is based on the City's assumptions presented in the February 2009 report Residential Land Strategy for Ottawa 2006-2031. Details on all other assumptions are summarized in Attachment D, MGP Response Update, Urban Area Land Requirement to 2031 Updated to Reflect Urban Area Residential Land Supply.

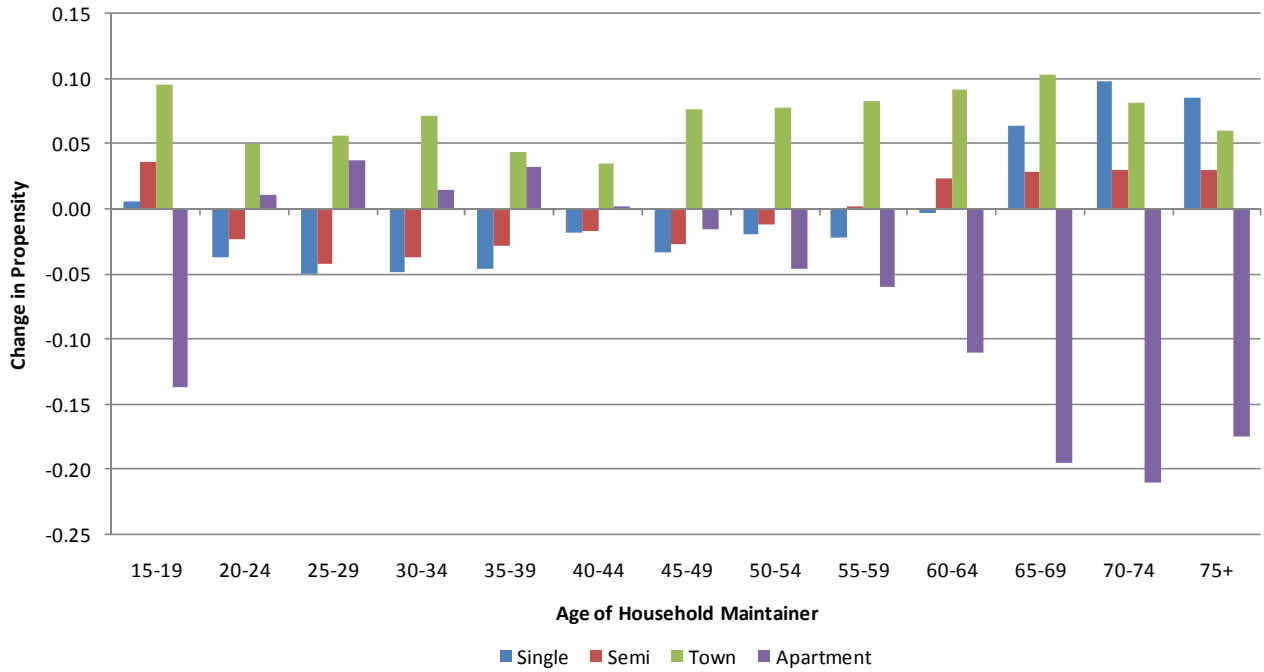
Attachment H
Urban Area Land Requirement to 2031 with
OPA 76 Housing Mix and Density and
the City's Strategy Net-to-Gross Assumptions

We have prepared a further alternative analysis using the proposed housing mix and minimum density provisions from OPA 76 and the net-to-gross assumption of 50% used in the *City's Strategy* along with all other assumptions used in *MGP's Response Update*. The following table details Ottawa's urban area land requirements to 2031 using these assumptions.

		Single	Semi	Town	Apartment	Total
Housing Requirements	Housing Requirements, 2006 to 2031	68,940	7,790	39,330	31,340	147,400
	<i>Proportion of Private Household Requirments, 2006 to 2031</i>	46.8%	5.3%	26.7%	21.3%	100.0%
Proportion Allocated to Rural Area	Proportion of Housing Allocated to Rural Area, 2006 to 2031	94%	1%	4%	1%	9%
	Rural Area Housing Requirements, 2006 to 2031	12,470	130	530	130	13,270
	Urban Area Housing Requirements, 2006 to 2031	56,470	7,660	38,800	31,210	134,130
Intensification	Probable Residential Intensification, 2006 to 2031	4,480	1,480	5,190	24,400	35,550
	Urban Greenfield Housing Requirements, 2006 to 2031	51,990	6,180	33,610	6,810	98,580
Greenfield Unit Supply and Demand Balance	Urban Greenfield Unit Supply, 2006	35,920	2,260	34,550	27,210	99,940
	Greenfield Supply and Demand Balance, 2006 to 2031	-16,070	-3,920	940	20,400	-
Provision for Mix	Provision for a Mix of Units	48.2%	11.8%	30.0%	10.0%	100.0%
	Urban Greenfield Unit Requirements	16,070	3,920	10,000	3,330	33,320
Net Residential Land Requirement	Suburban Development Density (upnh)	26	34	45	150	-
	Net Residential Land Requirement (net hectares)	618.1	115.3	222.2	22.2	977.8
Gross Developable Urban Land Requirement	Net-to-Gross Ratio	-	-	-	-	50%
	Gross Developable Land Requirement (gross hectares)	-	-	-	-	1,955.6

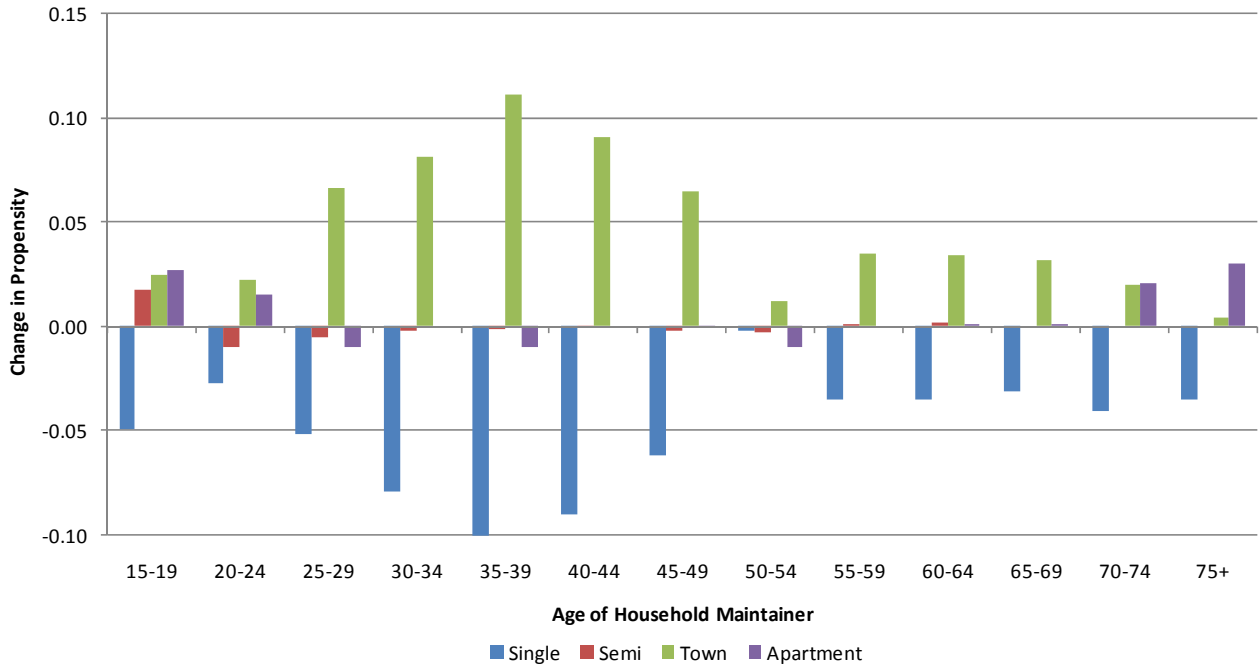
Source: Provision for a Mix of Unit and Suburban Development Density based on OPA 76 and the City's assumptions presented in the February 2009 report Residential Land Strategy for Ottawa 2006-2031. Net-to-Gross Ratio is based on the City's assumptions presented in the February 2009 report Residential Land Strategy for Ottawa 2006-2031. Details on all other assumptions are summarized in Attachment D, MGP Response Update, Urban Area Land Requirement to 2031 Updated to Reflect Urban Area Residential Land Supply.

Attachment I
Change in City of Ottawa Residents'
Dwelling Type Propensities by Age of Household Maintainer
1981 and 2006 Census Results



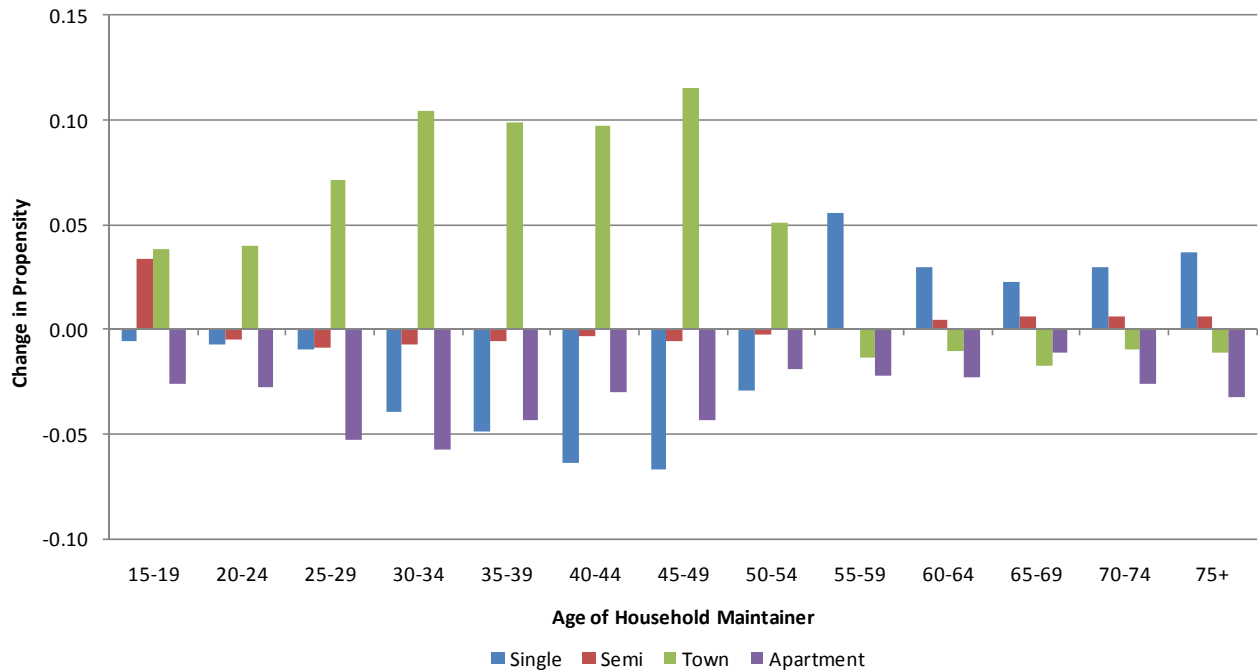
Source: Census custom tabulations provided to MGP by the City of Ottawa January 16, 2008.

Attachment J
Change in Projected Dwelling Type Propensities
By Age of Household Maintainer
2006 and 2031
City's Strategy Scenario 1



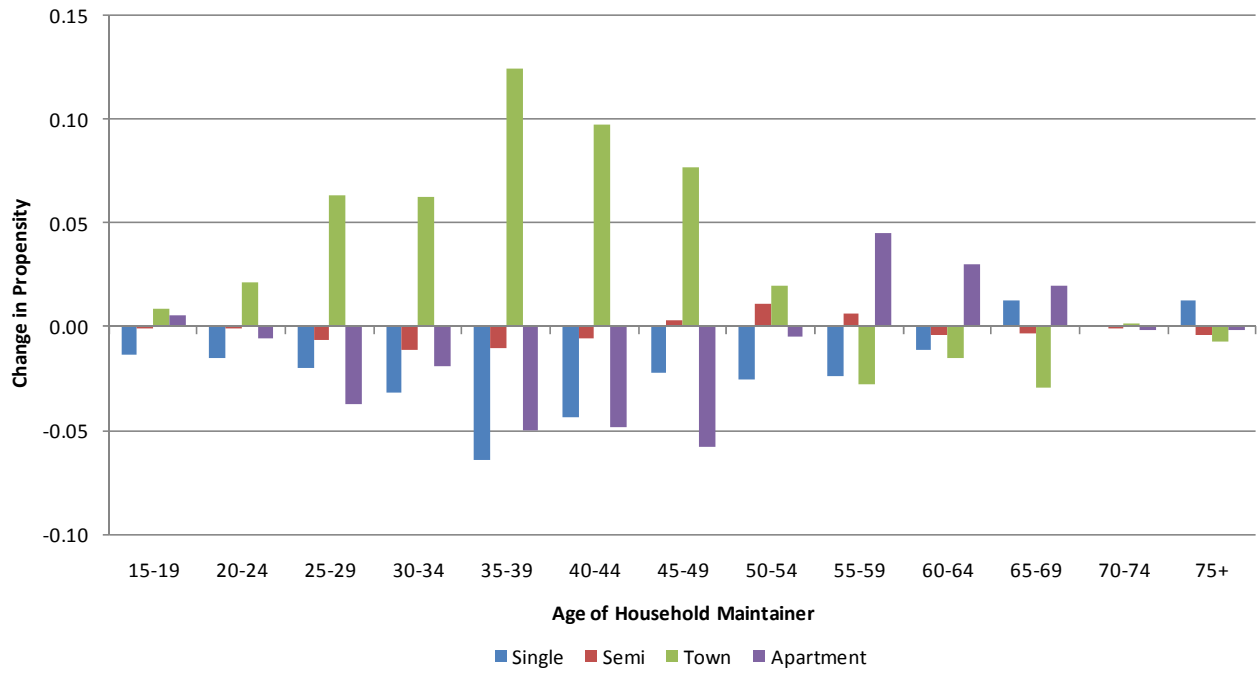
Source: City of Ottawa, Residential Land Strategy for Ottawa 2006-2031, February 2009, page A2-3 and A2-4.

City's Strategy Scenario 2



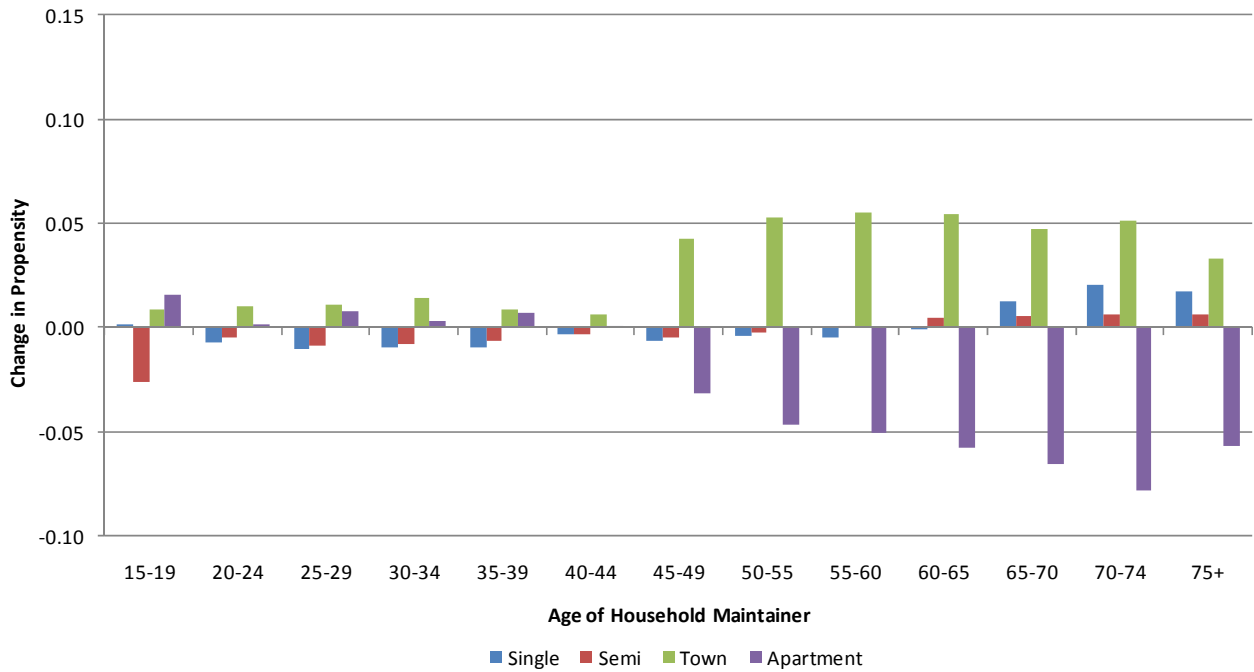
Source: City of Ottawa, Residential Land Strategy for Ottawa 2006-2031, February 2009, page A2-7 and A2-8.

City's Strategy Scenario 3 – "Preferred Scenario"



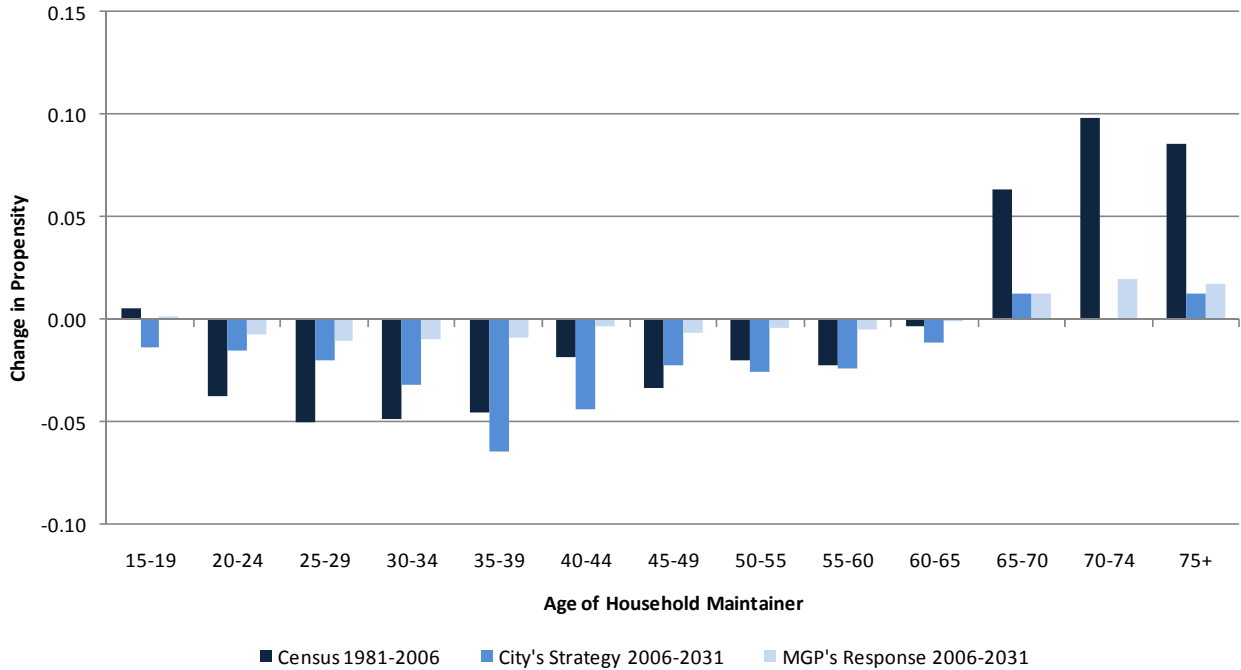
Source: City of Ottawa, Residential Land Strategy for Ottawa 2006-2031, February 2009, page A2-11 and A2-12.

Attachment K
Change in Projected Dwelling Type Propensities
By Age of Household Maintainer
2006 and 2031
MGP's Response



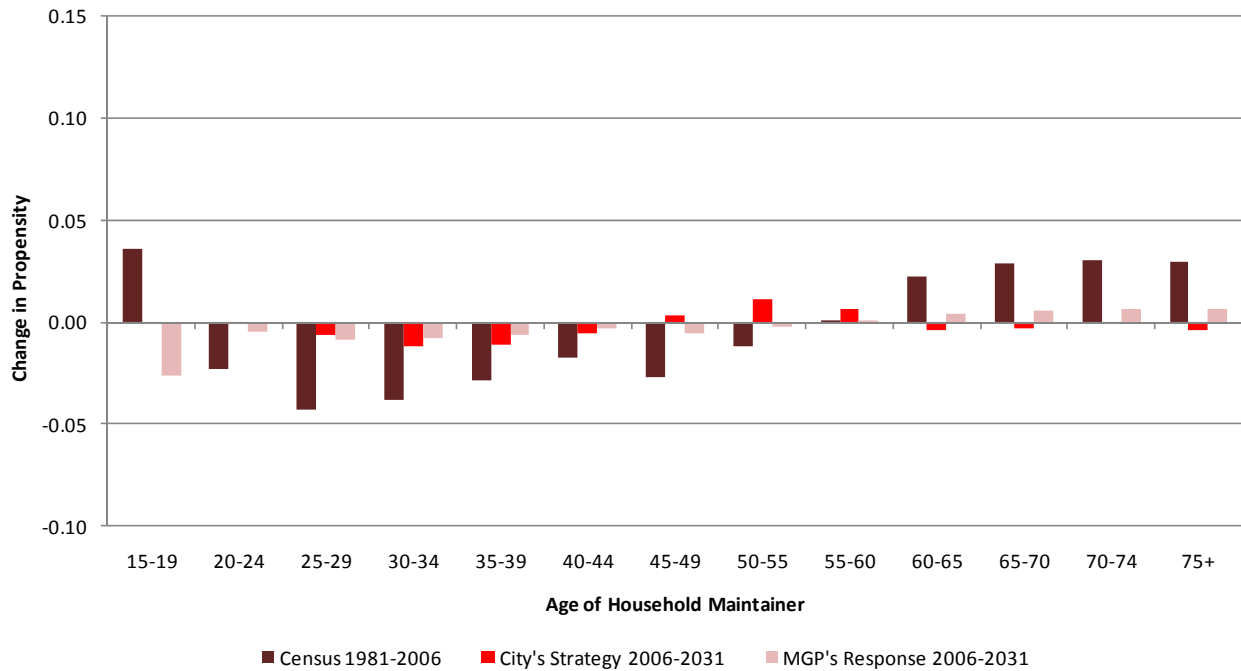
Source: Malone Given Parsons Ltd., Ottawa's Residential Land Needs Response to the City of Ottawa's Residential Land Strategy, March 2009, page A-6.

Comparison of Actual and Projected Propensity Changes for Singles, 1985-2006 and 2006-2031



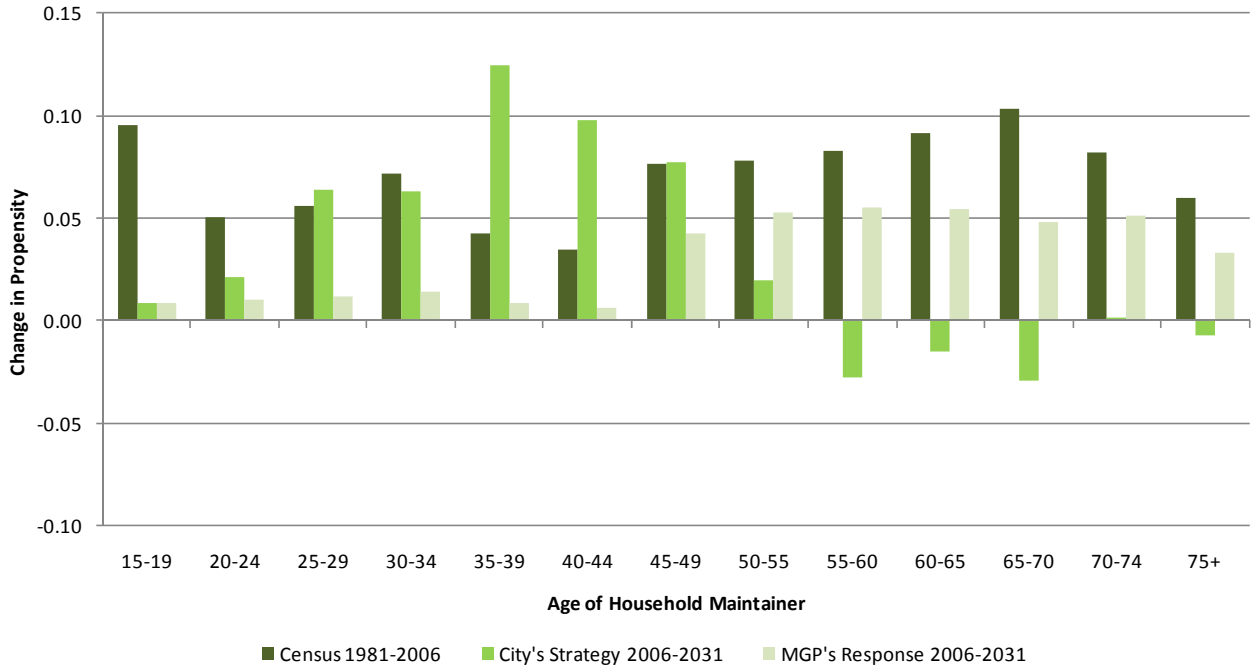
Source: Census custom tabulations provided to MGP by the City of Ottawa January 16, 2008; City of Ottawa, Residential Land Strategy for Ottawa 2006-2031, February 2009, page A2-11 and A2-12; and, Malone Given Parsons Ltd., Ottawa's Residential Land Needs Response to the City of Ottawa's Residential Land Strategy, March 2009, page A-6.

Comparison of Actual and Projected Propensity Changes for Semis, 1985-2006 and 2006-2031



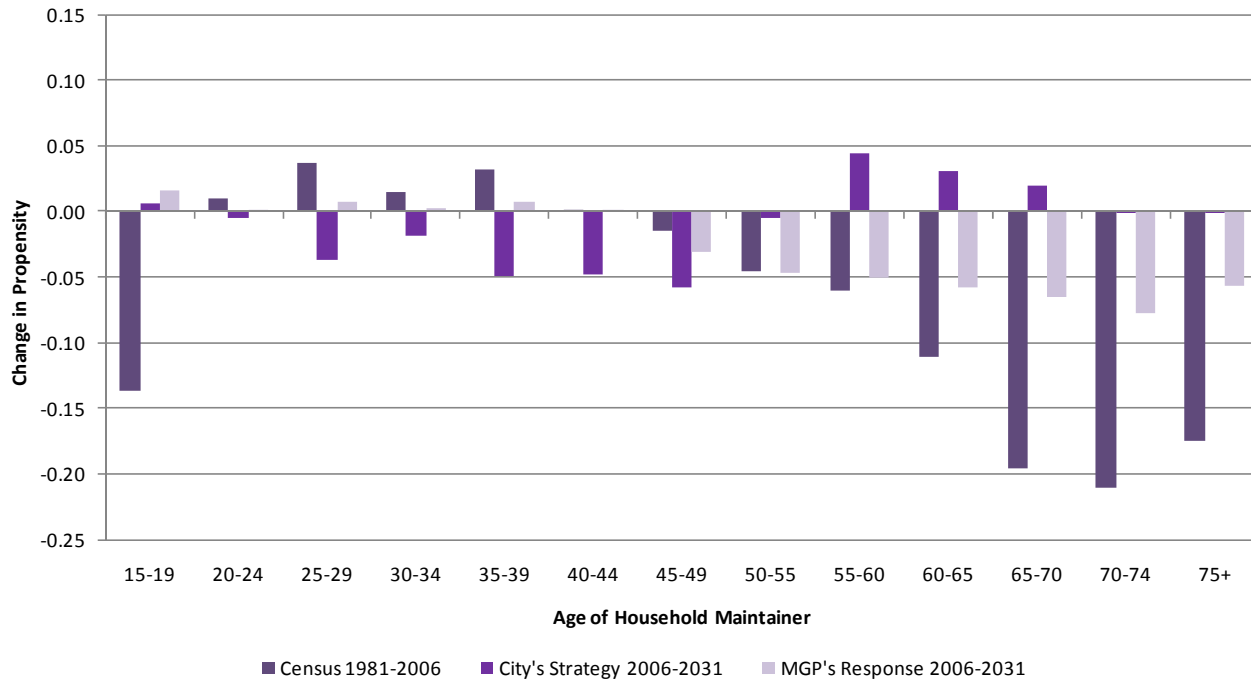
Source: Census custom tabulations provided to MGP by the City of Ottawa January 16, 2008; City of Ottawa, Residential Land Strategy for Ottawa 2006-2031, February 2009, page A2-11 and A2-12; and, Malone Given Parsons Ltd., Ottawa's Residential Land Needs Response to the City of Ottawa's Residential Land Strategy, March 2009, page A-6.

Comparison of Actual and Projected Propensity Changes for Towns, 1985-2006 and 2006-2031



Source: Census custom tabulations provided to MGP by the City of Ottawa January 16, 2008; City of Ottawa, Residential Land Strategy for Ottawa 2006-2031, February 2009, page A2-11 and A2-12; and, Malone Given Parsons Ltd., Ottawa's Residential Land Needs Response to the City of Ottawa's Residential Land Strategy, March 2009, page A-6.

Comparison of Actual and Projected Propensity Changes for Apartments, 1985-2006 and 2006-2031



Source: Census custom tabulations provided to MGP by the City of Ottawa January 16, 2008; City of Ottawa, Residential Land Strategy for Ottawa 2006-2031, February 2009, page A2-11 and A2-12; and, Malone Given Parsons Ltd., Ottawa's Residential Land Needs Response to the City of Ottawa's Residential Land Strategy, March 2009, page A-6.

Attachment L
Vacant Urban Residential Land Survey
Development Densities and Proportion of Units Built

Development Density (units per net hectare), 1995-2009

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Single Detached	21.1	21.1	22.4	20.8	21.6	22.3	21.2	20.4	19.7	20.4	19.8	20.5	21.3	22.1	23
Semi-detached	28.1	31.2	28.3	34.9	27.8	25.3	28.4	30.3	30.7	29.9	33.4	33.6	32.1	30.1	30.9
Townhouse	36.9	38.1	41.8	35.9	35.6	35.3	38.9	42	44.8	45.6	40.5	41.9	45.8	43.1	44.4
Stacked Townhouse	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	93.4	157.1	110.3	130.8	127.4	127.4
Apartment	77.7	112.8	200	56.9	48.4	39.2	80.8	144.1	129.2	209.3	219.7	98.3	198.4	162.9	275.7
Weighted Average	30.9	28.3	27.5	25.4	25.4	25.4	27.7	28.9	28.4	29.0	28.9	30.9	32.3	33.9	35.3

Source: 1995 from City of Ottawa, December 2001, Vacant Urban Residential Land Survey 1999-00 Update, page 7; 1996 to 2002 from City of Ottawa, November 2003, Vacant Urban Residential Land Survey 2002 Update, page 9; and, 2003 to 2009 from City of Ottawa, August 2010, Vacant Urban Residential Land Survey 2002 Update, page 6.

Proportion of Units Built on Vacant Urban Residential Land, 1995-2009

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Single-detached	35.0%	43.6%	58.8%	58.1%	60.8%	62.9%	53.0%	50.2%	56.6%	44.9%	45.4%	44.2%	41.3%	41.6%	39.5%
Semi-detached	3.9%	3.1%	3.1%	3.9%	5.3%	6.4%	5.8%	5.0%	5.3%	6.2%	6.1%	6.6%	7.5%	2.4%	4.0%
Townhouse	45.5%	51.7%	37.7%	34.9%	31.7%	29.2%	29.5%	31.1%	31.1%	45.3%	40.1%	39.0%	36.0%	35.7%	39.6%
Stacked Townhouse	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	4.8%	5.9%	12.5%	15.4%	8.2%
Apartments	15.6%	1.7%	0.3%	3.1%	2.2%	1.6%	11.7%	13.7%	7.0%	3.5%	3.6%	4.3%	2.8%	4.9%	8.7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: 1995 from City of Ottawa, December 2001, Vacant Urban Residential Land Survey 1999-00 Update, page 6; 1996 to 2002 from City of Ottawa, November 2003, Vacant Urban Residential Land Survey 2002 Update, page 6; and, 2003 to 2009 from City of Ottawa, August 2010, Vacant Urban Residential Land Survey 2002 Update, page 5.

Attachment M
Past Rates of Intensification
In the City of Ottawa
Based on Building Permits, 1998 to 2009

As part of the City/GOHBA Working Group, MGP was provided with and reviewed the City of Ottawa's intensification building permit data for the mid-2001 to mid-2006 period. In preparation for the OMB hearing, MGP requested pre-mid-2001 and post-mid-2006 intensification and non-intensification building permit data which was subsequently provided in October and November 2010. After reviewing the intensification permits, MGP and the City agreed to make a number of corrections to errors in the data set. MGP and the City are continuing to exchange data on this matter which may result in some further refinements to the following tables.

City of Ottawa Rates of Intensification in the Urban Area based on Building Permits, 1998 to 2009

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Total
Single	146	191	214	312	288	223	174	175	224	228	174	146	2,495
Semi-Detached	17	28	131	65	58	107	101	110	105	108	80	86	996
Townhouse	375	248	228	425	528	641	590	445	264	430	398	381	4,953
Apartment	207	25	297	402	1,256	898	1,442	429	910	1,147	1,321	787	9,121
<i>Addition to Single Dwellings</i>	1	1	2	12	3	20	10	13	18	20	13	21	134
<i>Stacked Townhouse Condo</i>				23	30	3	15	10		12			93
<i>Stacked Townhouse</i>									58	146	240	158	602
<i>Addition to Existing Apartment Buildings</i>			54	28	52	25	25	18	53	42	53	45	395
<i>Condo Apartments</i>				72	860	687	1,239	319	422	178	314	133	4,224
<i>New Apartment Buildings</i>	141	24	231	48					267	673	652	404	2,440
<i>New Rental Buildings</i>				121	218	163	70	39	39				650
<i>New Units From Conversions of Non-Res Uses</i>	65		10	59	26		1	2	6	29	49	20	267
<i>New Units in Non-Market Building & Rooming Houses</i>				39	67		82	28	47	47		6	316
Other	220	487	555	301	469	368	16	386	231	964	366	209	4,572
<i>Student Residences</i>		175	470	301	307	181		93		125			1,652
<i>Retirement Residences</i>	220	312	85		162	187	16	293	231	839	366	209	2,920
Total Intensification Units in Building Permits	965	979	1,425	1,505	2,599	2,237	2,323	1,545	1,734	2,877	2,339	1,609	22,137
Total Non-Intensification Units in Building Permits	2,708	3,155	4,118	4,045	4,492	3,716	4,417	3,006	3,332	4,350	4,182	3,724	45,245
Total Urban Area Units in Building Permits	3,673	4,134	5,543	5,550	7,091	5,953	6,740	4,551	5,066	7,227	6,521	5,333	67,382
Proportion Intensification	26.3%	23.7%	25.7%	27.1%	36.7%	37.6%	34.5%	33.9%	34.2%	39.8%	35.9%	30.2%	32.9%

Source: Based on City of Ottawa intensification and non-intensification building permits for 1998 to the first half of 2001 and the second half of 2006 to 2009 provided October and November 2010 and intensification building permits for mid-2001 to mid-2006 provided June 2008 to inform City/GOHBA Working Group discussions. Corrections to building permits have been prepared in consultation with City of Ottawa staff but are subject to further refinements.

In our opinion, the City's assumptions regarding past rates of intensification in the urban area should not be used as the benchmark for establishing a new city-wide target. Student Residences do not explicitly meet the OPA 76 definition of a "new dwelling unit" and 2007 to 2009 rates of intensification are inflated due to changes that the City made in its approach to measuring intensification after 2007. The following table shows the past rates of intensification in Ottawa based on OPA 76 policy and the approach to defining intensification agreed to by the City/GOHBA Working Group in May 2008 (specifically the reclassification of units on Greenfield land from intensification to non-intensification).

MGP Rates of Intensification in the Urban Area based on Building Permits, 1998 to 2009

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Total
Single	146	191	214	312	288	223	174	174	221	212	145	125	2,425
Semi-Detached	17	28	131	65	58	107	101	110	105	108	80	86	996
Townhouse	375	248	228	425	528	641	590	445	204	389	256	263	4,592
Apartment	207	25	297	402	1,256	898	1,442	429	910	1,147	1,305	763	9,081
<i>Addition to Single Dwellings</i>	1	1	2	12	3	20	10	13	18	20	13	21	134
<i>Stacked Townhouse Condo</i>				23	30	3	15	10		12			93
<i>Stacked Townhouse</i>									58	146	224	134	562
<i>Addition to Existing Apartment Buildings</i>			54	28	52	25	25	18	53	42	53	45	395
<i>Condo Apartments</i>				72	860	687	1,239	319	422	178	314	133	4,224
<i>New Apartment Buildings</i>	141	24	231	48					267	673	652	404	2,440
<i>New Rental Buildings</i>				121	218	163	70	39	39				650
<i>New Units From Conversions of Non-Res Uses</i>	65		10	59	26		1	2	6	29	49	20	267
<i>New Units in Non-Market Building & Rooming Houses</i>				39	67		82	28	47	47		6	316
Other	220	312	85	0	162	187	16	293	231	703	366	209	2,784
<i>Retirement Residences</i>	220	312	85		162	187	16	293	231	703	366	209	2,784
Total Intensification Units	965	804	955	1,204	2,292	2,056	2,323	1,451	1,671	2,559	2,152	1,446	19,878
Total Non-Intensification	2,708	3,155	4,118	4,045	4,492	3,716	4,417	3,007	3,395	4,543	4,369	3,887	45,852
Total Urban Area Units	3,673	3,959	5,073	5,249	6,784	5,772	6,740	4,458	5,066	7,102	6,521	5,333	65,730
Proportion Intensification	26.3%	20.3%	18.8%	22.9%	33.8%	35.6%	34.5%	32.5%	33.0%	36.0%	33.0%	27.1%	30.2%

Source: Based on City of Ottawa intensification and non-intensification building permits for 1998 to the first half of 2001 and the second half of 2006 to 2009 provided October and November 2010 and intensification building permits for mid-2001 to mid-2006 provided June 2008 to inform City/GOHBA Working Group discussions. Corrections to building permits have been prepared in consultation with City of Ottawa staff. Revised by MGP to exclude Student Residences and Greenfield land.

Ottawa Approach to Defining Intensification in the Urban Area
6 May, 2008 (V.2)

For 2006 and Prior Years:

Inside the Greenbelt (meaning inside the outer limit of the Greenbelt)

- All development inside the Greenbelt, except:
 - o large greenfield parcels under development in the Hunt Club-Conroy area.
- Isolated vacant parcels, such Tyrrell Place, will be included, since they conform to the PPS definition of "development of vacant or underutilized lots within previously developed areas".
- Retirement residences are included if they are comprised of self-contained apartment units.
- Nursing homes and long term care facilities are not included, but an adjustment needs to be made to remove the institutionalized population from population in private dwellings.
- Student residences are included in units built since 2001, and comprise part of the 2006 estimate of population and dwellings which formed the basis for the new projections.

Outside the Greenbelt

- Intensification limited to the following:
 - o small scale infill within existing areas (including some areas of Kanata North Business Park which allow mixed-uses due to a 1990's Kanata zoning by-law);
 - o redevelopment of small commercial sites (e.g. 988 Teron Road, redevelopment of a gas station, now Callaghan Private);
 - o conversions which add residential units to existing buildings;
 - o development of former industrial area west of Iber Road, although it may be "development of vacant or underutilized lots within previously developed areas" is not included.

This approach is more conservative (i.e. produces a lower intensification figure) than would application of the Greater Golden Horseshoe's "built boundary" approach.

For 2007 and Future Years:

Inside the Greenbelt

- All development starting in 2007 is some form of intensification.

Outside the Greenbelt

- Intensification will be limited to the following:
 - o small scale infill within existing areas, as above;
 - o redevelopment of small commercial sites;

Attachment N

- conversions which add residential units to existing buildings;
- unusual situations can be discussed.
- Development in areas such as Kanata South Business Park, Jackson Trails and the Mer Bleue CDP lands will be classed as greenfield development, not intensification.
- Isolated pockets of greenfield land, such as the remaining pockets within Bridlewood, will be classed as greenfields, not intensification;
- However, school sites that are a) redevelopment of a closed school, or b) development on a site reserved for a school but not required should be included in intensification.

Attachment O
List of Documents to be Relied On

1. City of Ottawa, *Annual Development Reports*, various years.
2. City of Ottawa, *City of Ottawa Official Plan (January 2007 Consolidation)*, adopted May 2003.
3. City of Ottawa, *Infrastructure Master Plan*, June 2009.
4. City of Ottawa, *Official Plan Amendment No. 76 to the Official Plan of the City of Ottawa (5 Year Comprehensive Official Plan Review)*, June 2009.
5. City of Ottawa, *Ottawa 20/20 – Economic Strategy* and supporting plans, April 2003.
6. City of Ottawa, *Partnerships for Prosperity – Ottawa’s Five-Year Investment Strategy for Sustainable Economic Prosperity*, June 2010.
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