



**Education Development Charges Background Study
and Review of Education Development Charges
Policies for: Kawartha Pine Ridge District School
Board and Peterborough Victoria Northumberland and
Clarington Catholic District School Board**

County of Peterborough/City of Peterborough

(As Amended Nov 18, 2021)

November 15, 2021

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
KPRDSB	Kawartha Pine Ridge District School Board
PVNCCDSB	Peterborough Victoria Northumberland and Clarington Catholic District School Board
EDC	Education Development Charge
GFA	Gross Floor Area
GSR	Grade Structure Ratio



Foreword and Acknowledgements

Section 257.61 (1) of the *Education Act* states that, “Before passing an education development charge by-law, the board shall complete an education development charge background study.” Section 257.61 (2) of the Act as well as section 9 of Ontario Regulation 20/98, as amended, provide the information that must be contained in the background study. This report contains background studies for the Peterborough Victoria Northumberland and Clarington Catholic District School Board (PVNCCDSB) and the Kawartha Pine Ridge District School Board (KPRDSB).

The consultant would like to acknowledge and thank the staff at the PVNCCDSB and the KPRDSB for their work, time, and effort over the past several months. Staff from both Boards provided invaluable input and assistance throughout the EDC process.

The consultant would also like to thank Mr. Jim Easto of the firm Keel Cottrelle LLP, legal counsel for both School Boards, and Mr. Chris Vardon of Cushman & Wakefield, the appraisal firm responsible for the site valuations.

Ministry of Education Legislative Updates March 29, 2019

On March 29, 2019, the Minister of Education enacted a regulation amending Ontario Regulation 20/98 with Ontario Regulation 55/19. This amendment provides a provisional phase-in of the proposed EDC rates. A school board’s existing or most recent EDC residential rates could now be increased by \$300 or 5% of the existing rate or most recent rate (whichever is greater). For non-residential EDC rates, the charge could be increased by \$0.10 or 5% of the existing or most recent rate (again, whichever is greater).

Additionally, in year 2 of the by-law and each subsequent year thereafter (to the maximum term of the by-law) the residential rate could increase by a further \$300 or 5%



of the previous year charge (whichever is greater). Similarly, the non-residential rate could increase by an additional \$0.10 or 5% of the previous year charge. These increases would occur until the charge reached the proposed or maximum rate.

While the KPRDSB and PVNCCDSB do not have existing EDC bylaws in the City and County of Peterborough, both Boards did have EDC bylaws in place at one time and those bylaws expired and were not renewed. Therefore the most recent Education Development Charge for the KPRDSB was \$136 for residential and \$0.04 per square foot of gross floor area for non-residential. For the PVNCCDSB, the most recent EDC was \$62 for residential and \$0.02 per square foot of gross floor area for non-residential.

Based on this legislative change, the new first year EDC charge for PVNCCDSB would be **\$362 (\$300+\$62)** and for the KPRDSB the residential charge would be **\$436 (\$300+\$136)** per residential dwelling. The non-residential charge for the PVNCCDSB would be **\$0.12 (\$0.10+\$0.02)** and for the KPRDSB it would be **\$0.14 (\$0.10+\$0.04)** per square foot of gross floor area in the first year.

These charges would thereafter rise by \$300/annum and \$0.10/annum respectively, until each board's respective charge reaches its maximum value. This will occur in year 2 for the PVNCCDSB for both the residential and non-residential rate and for the KPRDSB, it would occur in year 3 for the non-residential rate and year 4 for the residential rate.

Please note that there was a small error identified in the original EDC Background Study. The year 5 phase-in rate for the PVNCCDSB in table 5-3 on page 5-12 originally stated that it was \$582 when it should have been \$524. This has been corrected and did not impact any other parts of the report or calculation.



Executive Summary



Executive Summary

EDCs are a revenue source, for school boards that qualify, to purchase and develop land for new schools. EDCs are meant as a funding mechanism for boards that are experiencing a growth-related accommodation need in their jurisdiction. In order to renew their by-laws each Board must follow processes and guidelines as required by provincial legislation. This background study fulfills legislative requirements while providing the necessary context to the understanding and determination of the EDC.

The general authority for school boards to impose EDCs is provided by Division E of Part IX for the *Education Act*. Ontario Regulation 20/98, as amended, provides the requirements necessary to determine an EDC. In addition, the Ministry has published a set of EDC Guidelines to assist boards with the EDC process.

Before an EDC by-law can be passed, school boards must ensure that they:

- Demonstrate that their elementary or secondary enrolment on a jurisdiction-wide basis is greater than the elementary or secondary OTG-approved capacity, or that their EDC reserve fund is in a deficit position.
- Prepare a background study meeting the requirements of the legislation.
- Hold required legislated public meetings.
- Receive written Ministry approval of the projected number of students and school sites.

Both the PVNCCDSB and the KPRDSB are eligible to impose an EDC by-law on the basis of the **Capacity Trigger** – that is, both boards' average projected five-year enrolment exceeds the approved OTG capacity on the elementary panel for the County and City of Peterborough.

The Boards intend to hold joint statutory public meetings to inform the public as to the new proposed EDC by-law. The Boards plan to hold a joint meeting on November 29, 2021. The Boards will consider passage of the EDC by-laws at additional board meetings early in 2022 but final dates have yet to be determined. Further details are provided in the Boards' public meeting notice contained in this report.



The EDC analysis in this background study has been completed for both the PVNCCDSB and the KPRDSB within the County of Peterborough including the City of Peterborough. The PVNCCDSB's jurisdiction spans the Municipality of Clarington, Northumberland County, the County of Peterborough and the City of Kawartha Lakes (formerly called Victoria County). The KPRDSB's jurisdiction spans the Municipality of Clarington, Northumberland County and Peterborough County. This EDC study contemplates by-laws only within the County of Peterborough/City of Peterborough which is defined as a separate region for EDC by-laws.

Demographic projections form an important component of the EDC analysis. The residential dwelling unit forecast is used both to project pupils from new development and to determine the final quantum of the residential charge. The residential forecasts used in this analysis are consistent with the most recent County/City forecasts that were available at the time of study preparation. The number of net new units projected in the County and City of Peterborough for the 15 years in the EDC analysis totals **13,765**. The total net estimated non-residential board-determined gross floor area to be constructed over 15 years from date of by-law passage is **5,723,297**.

The number of growth-related pupils is based on the aforementioned residential forecast and pupil yields that have been derived from Statistics Canada custom tabulated data and historical board enrolment information. Pupil yields are mathematical representations of the number of school-aged children that will be generated by particular dwellings, based on type. The total growth-related pupils must be offset by any available pupil places that are not occupied by existing pupils of the Boards. These calculations were done for both Boards on a review area basis to determine the total net growth-related pupil places.

The analysis projects a total of **656** elementary net growth-related pupils and **242** secondary net growth-related pupils for the PVNCCDSB in the County and City of Peterborough. For the KPRDSB, a total of **1,493** elementary net growth-related pupils were projected while secondary enrolment was projected to total **860** net growth-related pupil places in the County and City of Peterborough.

Once the net growth-related pupil place requirements have been determined, it is necessary for boards to decide the number of new schools that will be built to accommodate that need. The EDC legislation provides a table that relates pupil place requirements to school site sizes. The table, as well as a description and methodology,



is provided in the background study. The study also provides information on the approximate timing, size, and location of the proposed new schools/sites.

The EDC analysis for the County and City of Peterborough predicts that the PVNCCDSB will require approximately **2 new elementary sites**, one in Peterborough County and City – Southeast (ERA02), and one in Peterborough County and City – Northwest (ERA03). On the secondary panel, **1 new secondary site** may be required in Peterborough – North (SRA02) within the 15-year EDC time frame.

The KPRDSB's EDC analysis for the County and City of Peterborough projects a requirement of approximately **3 new elementary sites**. Two sites will be required in Peterborough County and City – Southwest (ERA01), while one site will be required in Peterborough County and City – Northeast (ERA02). On the secondary panel, **1 new secondary site** will be required in the County/City of Peterborough within the 15-year EDC time frame.

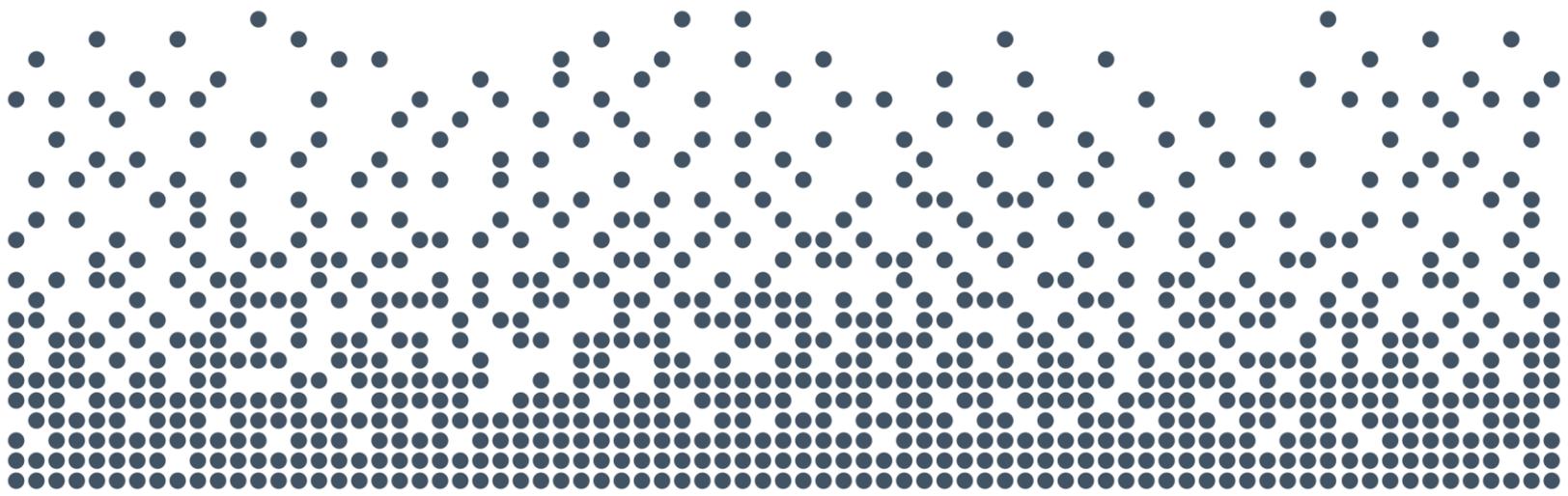
One of the final steps of the EDC process involves translating the land requirements to actual land costs. Site acquisition costs are based on appraisals completed by the firm of Cushman & Wakefield. The per acre acquisition values ranged from **\$675,000** to **\$700,000** for sites in Peterborough County and City. Due to the uncertainty in land values over the past two years, largely as a result of the COVID pandemic, there have been no escalation rates applied to land values at this time.

The costs to prepare and develop the site for school construction are also EDC-eligible costs. The assumed site preparation costs are based on Board experiences and have been escalated to the time of site purchase at a rate of **3.1%** per year.

The total land costs (acquisition and servicing costs) as well as study costs must be added to any outstanding financial obligations incurred by the board under a previous EDC by-law to determine the final net education land costs. A deficit balance in the existing EDC reserve fund is considered to be an outstanding obligation and must be added to the existing land costs. If a board has a surplus balance in the EDC reserve fund, this amount must be subtracted from the land costs and used to defray the net education land costs. There is no EDC currently in place for the County or City of Peterborough and there is no outstanding reserve fund balance and as such, this criterion is not considered in the present evaluation.



On the basis of the aforementioned net education land costs and net new unit forecasts, the analysis resulted in a proposed EDC rate of **\$524 per dwelling unit** for the PVNCCDSB's residential charge and **\$0.14 per square foot of gross floor area** for the non-residential charge in the County/City of Peterborough. The new proposed EDC rate for the KPRDSB is **\$1,246 per dwelling unit** for the residential charge and **\$0.33 per square foot of gross floor area** for the non-residential charge in the County/City of Peterborough. The charges contained herein are based on a uniform rate for all types of development, with 90% of costs allocated to residential development and 10% of the costs to non-residential development, applicable only within the County of Peterborough/City of Peterborough.



Report



Chapter 1

Introduction



1. Introduction

1.1 Background

Education development charges (EDCs) are a revenue source for school boards to purchase and develop land for new schools. EDCs are meant as a funding mechanism for boards that are experiencing a growth-related accommodation need in their jurisdiction. In order to qualify for EDCs, it is necessary for school boards to meet certain “triggers.”

School boards no longer have the ability to implement property taxes to fund education costs and now rely on a system of per pupil grants established by the Ministry of Education. The grants are set out to cover expenses such as teacher salaries, textbooks, heating of schools, renewing schools, building schools, etc. EDCs are meant to fund the acquisition and development of growth-related school sites outside this grant envelope. EDCs are based on a formulaic approach that looks at three main areas – enrolment projections to determine need, the number of school sites necessary to meet need, and the costs related to the purchase and development of those school sites.

The EDC may be levied by a school board on both residential and non-residential developments, subject to certain exemptions which are outlined in the legislation. Division E of Part IX of the *Education Act* is the legislation responsible for governing the EDC. Ontario Regulation (O. Reg.) 20/98, as amended, provides guidelines and requirements on the qualification process for a school board as well as the specifics on calculating the charge. The charges are collected at building permit issuance on behalf of the school board by the local area municipality to which the by-law applies.

As mentioned earlier, not all school boards are eligible to implement EDCs due to qualification triggers that must be met. One trigger is that the board’s total projected enrolment for the five-year period following expected by-law passage must exceed the board’s Ministry-rated on-the-ground (OTG) capacity on *either* the elementary or secondary panel.

The other qualification trigger deals with unmet financial obligations with regard to the purchase and development of growth-related school sites. If the school board has an existing EDC by-law in place and they can demonstrate that there are existing



outstanding financial obligations, the school board will automatically qualify for a subsequent by-law. The *Education Act*, specifically section 257.54, gives school boards the ability to pass EDC by-laws.

“If there is residential development in the area of jurisdiction of a board that would increase education land costs, the board may pass by-laws for the imposition of education development charges against land in its area of jurisdiction undergoing residential or non-residential development.”

School boards are responsible for providing school sites and can do so through such limited revenue sources as selling surplus school sites, revenue from leasing sites, entering into joint use agreements with other school boards or public/private partnerships, and the imposition of EDCs – thus making EDCs an important revenue source.

1.2 EDC Policy Review

All school boards with an existing EDC by-law in place must conduct a review of the policies contained in their existing by-laws before passing a new by-law. This process includes a policy review report as well as a public meeting to review the policies in a public forum.

Section 257.60 subsection (1) of the *Education Act* states that:

“Before passing an education development charge by-law, the board shall conduct a review of the education development charge policies of the board.”

Subsection (2) goes on to state that:

“In conducting a review under subsection (1), the board shall ensure that adequate information is made available to the public, and for this purpose shall hold at least one public meeting, notice of which shall be given in at least one newspaper having general circulation in the area of jurisdiction of the board.”



1.3 Area in Which the By-law May Apply

The legislation states that an EDC by-law may apply to the entire area of the jurisdiction of a board or only part of it. In addition, an EDC by-law of the board shall not apply with respect to land in more than one “region” if the regulations divide the area of the jurisdiction of the board into prescribed regions. Both the KPRDSB’s and the PVNCCDSB’s jurisdictions have been divided by the County/City of Peterborough within the legislation for the purpose of calculating the EDC and as such there are two separate calculations, one for each Board contained within the County/City of Peterborough, presented in this report.

“Education development charges collected under an education development charge by-law that applies to land in a region shall not, except with the prior written approval of the Minister, be used in relation to land that is outside that region” and “money from an EDC reserve fund established under section 16 (1) of O. Reg. 20/98 may be used only for growth-related net education land costs attributed to or resulting from development in the area to which the EDC by-law applies.”

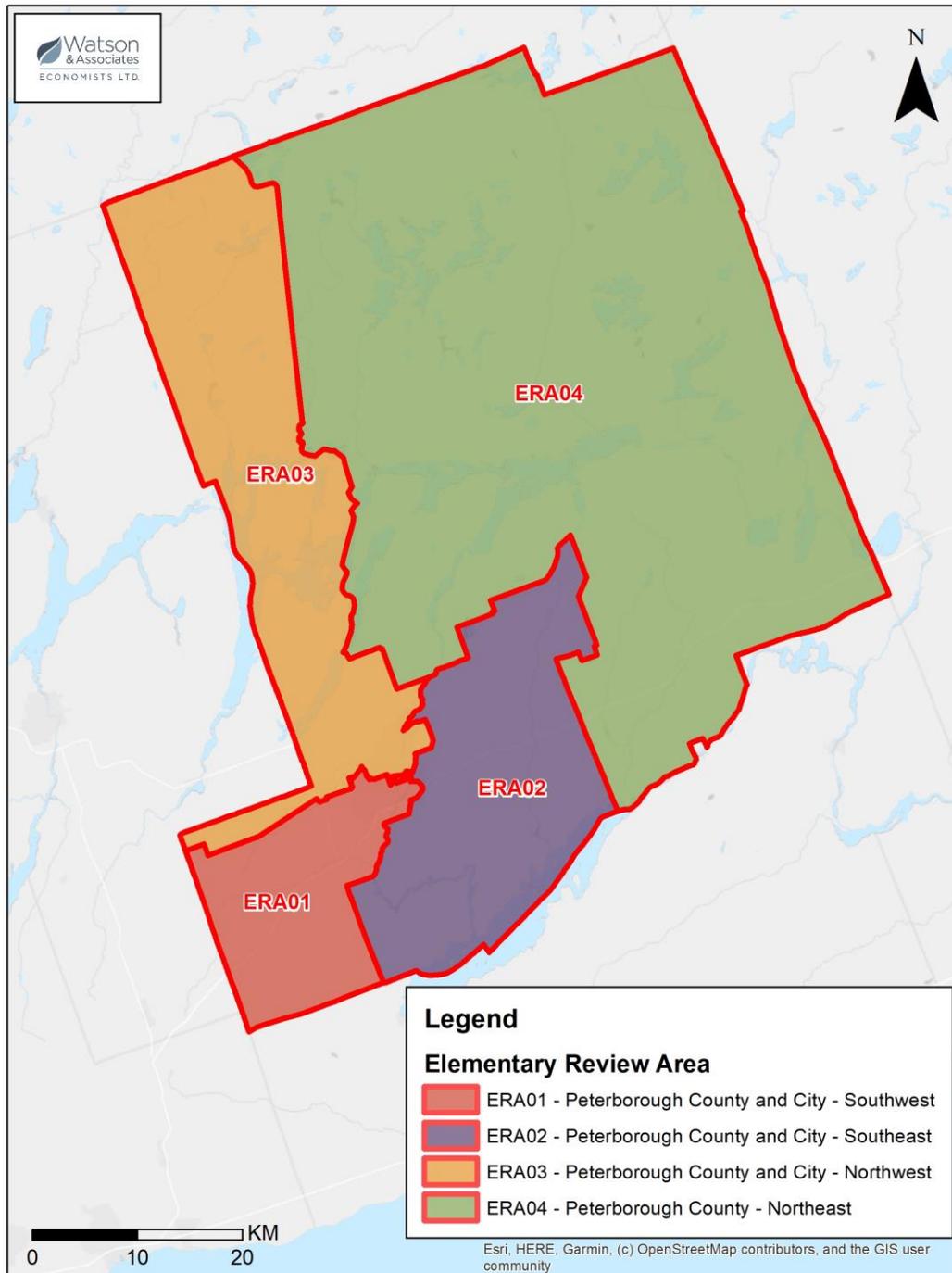
EDC background studies should clearly outline the areas that will be covered by EDC by-laws. Four maps have been included on the following pages outlining the County/City of Peterborough (PVNCCDSB and KPRDSB), the area to which the EDC by-laws will apply, and the respective review areas for each Board and panel.

1.4 EDC Review Areas

The EDC methodology allows school boards to examine growth-related needs on a jurisdiction-wide basis – that is, to treat the whole EDC area as one review area – or to examine them on a sub-area basis or review areas. Review areas are artificial constructs that to divide a board’s jurisdiction into sub-areas in order to determine the location of new school sites more accurately. Board review areas are likely to reflect attendance boundaries for families of schools, natural dividers such as rivers and creeks, or man-made barriers such as major thoroughfares. The Ministry of Education’s EDC Guidelines recommend that review areas are consistent with board review areas used for capital planning purposes and that they try to maintain consistency with review areas of subsequent EDC by-laws.

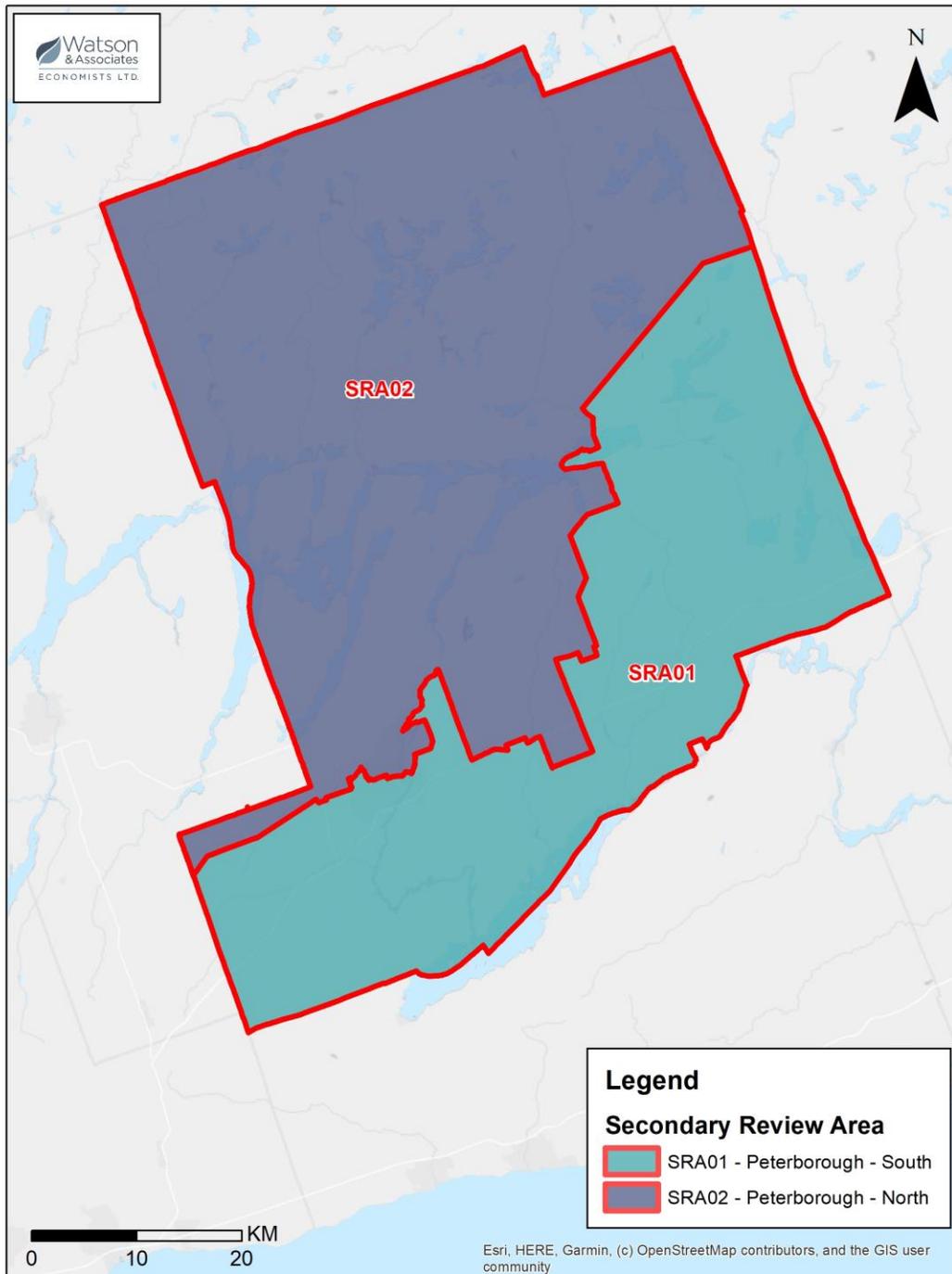


Map 1: PVNCCDSB Elementary EDC Review Areas 2020 – County of Peterborough and City of Peterborough



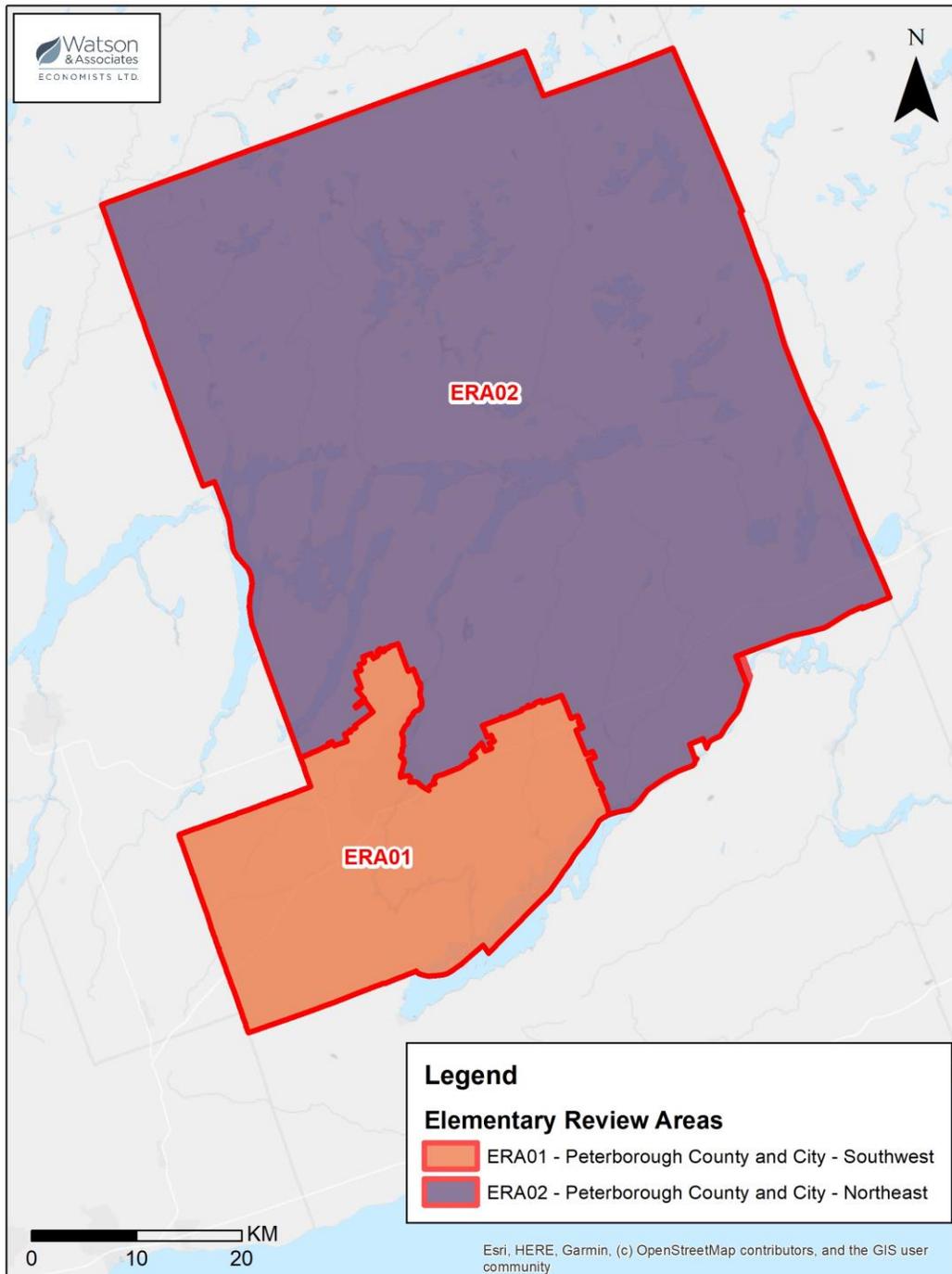


Map 2: PVNCCDSB Secondary EDC Review Areas 2020 – County of Peterborough and City of Peterborough



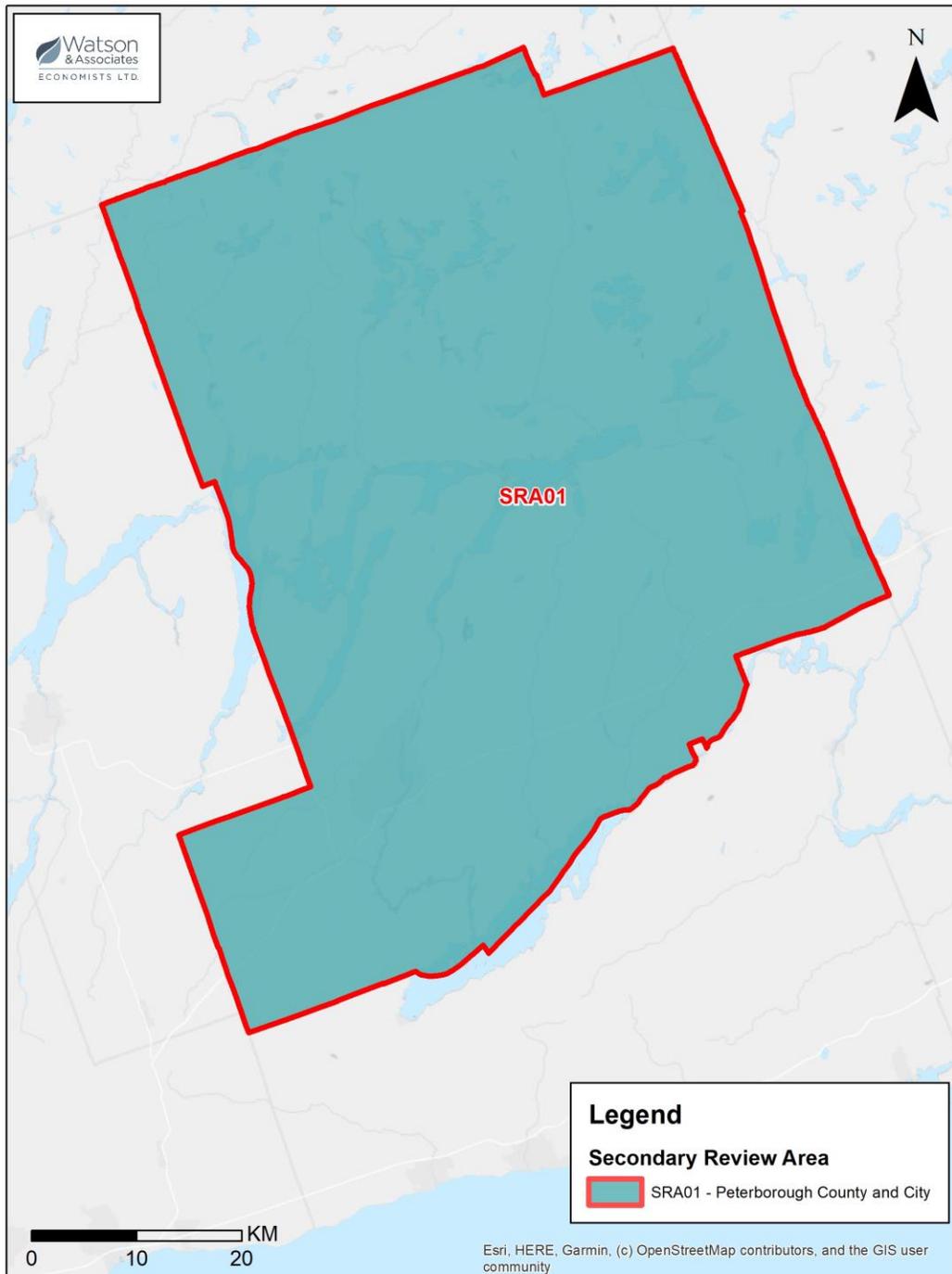


Map 3: KPRDSB Elementary EDC Review Areas 2020 – County of Peterborough and City of Peterborough





Map 4: KPRDSB Secondary EDC Review Areas 2020 – County of Peterborough and City of Peterborough





For the purposes of calculating EDCs, the PVNCCDSB has used **4** elementary review areas and **2** secondary review areas for the County/City of Peterborough by-law, while the KPRDSB has used **2** elementary review areas and **1** secondary review area.

PVNCCDSB Review Areas – County of Peterborough and City of Peterborough

Elementary Review Areas:

ERA01 – Peterborough County and City – Southwest

ERA02 – Peterborough County and City – Southeast

ERA03 – Peterborough County and City – Northwest

ERA04 – Peterborough County – Northeast

Secondary Review Areas:

SRA01 – Peterborough County and City – South

SRA02 – Peterborough County and City – North

KPRDSB Review Areas – County of Peterborough and City of Peterborough

Elementary Review Areas:

ERA01 – Peterborough County and City – Southwest

ERA01 – Peterborough County and City – Northeast

Secondary Review Areas:

SRA01 – Peterborough County and City

The EDC, when calculated on a review area basis, assumes that the combined OTG capacity of the existing facilities located within the review area serves as the total available capacity. Determining board needs on a review area basis is premised on the following:

- Available space is determined by subtracting the year 15 existing community enrolment number from the current OTG capacity figure;
- Pupils that are generated from new development must fill any available surplus OTG capacity first; and



- Pupils generated from new development above and beyond those that fill any available surplus space within the review area are net growth-related pupil place requirements and can potentially be funded through EDCs.

The review area approach to calculating EDCs has been undertaken by both boards and is largely consistent with the way in which future capital needs will be assessed over the long term.



Chapter 2

The EDC By-law



2. The EDC By-law

2.1 Imposition of an EDC

The passage of an EDC by-law gives school boards the authority to impose and collect EDCs for the purpose of acquiring and developing growth-related school sites. Each by-law has a maximum term of five years and must be passed within one year of EDC background study completion. Before a school board can proceed with an EDC by-law, it must receive confirmation in writing from the Ministry of Education acknowledging receipt of the background study and approving estimates of enrolment projections and future site needs contained in the background study.

Section 10 of O. Reg. 20/98 sets out the conditions that must be satisfied in order for a board to pass an EDC by-law:

- The Minister has approved the board's estimates of the total number of elementary and secondary pupils over each of the 15 years of the forecast period;
- The Minister has approved the board's estimates of the number of elementary and secondary school sites used by the board to determine the net education land costs;
- The board has demonstrated that the average elementary or secondary enrolment within its jurisdiction exceeds the board's elementary or secondary capacity; or the board's current EDC financial obligations exceed revenues reported in the EDC reserve fund;
- The board has prepared a background study and given a copy of the EDC background study relating to the by-law to the Minister and each board having jurisdiction within the area to which the by-law would apply;
- The area to which the board proposes the EDC by-law is enforced and charges are imposed is the same area that was subject to the EDC charge by-law in force on August 31, 2018; and
- The board provides any information regarding the calculation of the EDC if requested by the Minister upon the review of the background study.



2.2 The Background Study

An EDC background study must be completed by a school board that wishes to pass an EDC by-law. The intention of the background study is to provide information on the process and methodology of calculating an EDC, as well as the background and assumptions that make up the estimates of the enrolment projections and site needs.

Section 257.61 (1) of the Act requires that “before passing an education development charge by-law, the board shall complete an education development charge background study.”

Section 257.61 (2) of the Act and O. Reg. 20/98 sections 9 (1) and (2) set out the following information that must be included in an EDC background study:

Section 9 (1):

- Estimates of the anticipated amount, type and location of new dwelling units for each year of the 15-year forecast period in the area in which the charge is to be imposed;
- The number of projected new pupil places as a result of new growth and the number of new school sites needed to provide accommodation for those students;
- The number of existing pupil places by school and the number of available spaces to accommodate the projected number of new pupil places;
- For every existing elementary and secondary pupil place in the board’s jurisdiction that the board does not intend to use to accommodate pupils from new growth, an explanation as to why the board does not intend to do so.

Section 9 (2):

- For each elementary and secondary school site, estimates of the net education land cost, the location of the site, the area of the site (including the area that exceeds the maximum set out in section 2 of O. Reg. 20/98, and an explanation of whether the costs of the excess land are education land costs and if so, why);
- The number of pupil places the board estimates will be provided by the school to be built on the site, and the number of those pupil places that the board estimates will be used to accommodate new pupil places;



The EDC Guidelines suggest that school boards are required to provide the Ministry with a copy of the final background study at least 40 days prior to the anticipated by-law passage date. In addition, the background study must be made available to the public at least two weeks prior to the legislated public meeting.

2.3 Public Meetings

Before a school board can pass an EDC by-law, the legislation requires that the board hold at least one public meeting. The purpose of the meeting is to advise any interested stakeholders and the public at large of the board's intentions and address the new proposed EDC by-law. The public meeting also gives the community and stakeholders the opportunity to voice any issues or concerns they have with regard to the proposed by-law.

The board is required to provide at least 20 days' notice of the meeting and must make the background study as well as the new proposed by-law available to the public at least two weeks in advance of said meeting. O. Reg. 20/98 states that notice of a public meeting can be given in two ways:

- To every owner of land in the area to which the proposed by-law would apply by personal service, fax or mail.
- By publication in a newspaper that is, in the secretary of the board's opinion, of sufficiently general circulation in the area to which the proposed by-law would apply to give the public reasonable notice of the meeting.

If a school board already has an existing in-force EDC by-law in place, the board must hold an additional meeting to review the existing policies of the current EDC by-law. This part of the process is necessary in order to fulfil the necessary requirements of the policy review process. It should be noted that this policy review meeting can be addressed by the board during its EDC public meeting.

The Boards intend to hold public meetings to inform the public of the new proposed EDC by-laws. The Boards will hold a joint meeting on November 29, 2021.



EDUCATION DEVELOPMENT CHARGES
City and County of Peterborough
NOTICE OF PUBLIC MEETINGS

FIRST PUBLIC MEETING
EDC POLICY REVIEW
Monday, November 29, 2021 @ 7:00 p.m.

IMMEDIATELY FOLLOWED BY:

SECOND PUBLIC MEETING
CONSIDERATION OF PROPOSED BY-LAWS
Monday, November 29, 2021 @ 7:15 p.m.

THIRD PUBLIC MEETING
CONSIDERATION OF BY-LAW ADOPTION
Tuesday, February 22, 2022 @ 6:30 p.m.
(Peterborough Victoria Northumberland Clarington
Catholic District School Board)

Tuesday, February 22, 2022 @ 7:30 p.m.
(Kawartha Pine Ridge District School Board)

The purpose of the first joint public meeting on November 29, 2021 will be to review the current education development charge policies of both Boards and to solicit public input.

The purpose of the second joint public meeting on November 29, 2021 is to consider the imposition of education development charges in the City of Peterborough and County of Peterborough, the proposed by-laws, and to inform the public generally about the education development charge proposal of each Board.

The purpose of the third public meeting for each Board is to consider the enactment of an EDC by-law in the City of Peterborough and County of Peterborough.



Should by-laws be passed, collection of education development charges pursuant to such by-laws may commence on March 1, 2022.

All interested parties are invited to attend the meetings. Any person who attends any of the meetings may make a representation to the Boards related to the proposed by-laws. The Boards will also consider any written submissions.

A Policy Review Document setting out the Boards' education development charge policies, as well as the EDC Background Study required under section 257.61 of the Education Act (and the proposed EDC by-laws) setting out each Board's EDC proposal, will be available on the Boards' websites on or before November 12, 2021.

All of these meetings will be held through electronic means. The Boards will post on their websites instructions on how to participate in the meetings at a time closer to the dates of the meetings. If in-person attendance becomes an option, more information about this will be posted on the Boards' websites. If you wish to be sent instructions on how to participate in any of the meetings, please communicate with the Board administrators at the telephone numbers and e-mail addresses provided below.

The Boards would appreciate receiving written submissions one week prior to the public meetings. Submissions and requests to address the Boards as a delegation, as well as any comments or requests for further information regarding this matter, should be submitted to:

Jeannette Thompson
Manager, Planning Services
Kawartha Pine Ridge District School Board
1994 Fisher Dr., PO Box 7190
Peterborough, Ontario, K9J 7A1
Telephone: 705-742-9773 (ext. 2169)
E-mail: jeannette_thompson@kprdsb.ca
Website: <http://www.kprschoools.ca>

Diane Lloyd, Chairperson of the Board
Rita Russo, Director of Education and
Secretary of the Board

Kawartha Pine Ridge District School Board

Isabel Grace
Superintendent of Business and Finance/ Plant
**Peterborough Victoria Northumberland and
Clarington Catholic District School Board**
1355 Lansdowne St W
Peterborough, Ontario, K9J 7M3
Telephone: 705-748-4861 (ext.1246)
E-mail: igrace@pvncdsb.on.ca
Website: <https://www.pvncdsb.on.ca>

David Bernier, Chairperson of the Board
Joan Carragher, Director of
Education/Secretary Treasurer

**Peterborough Victoria Northumberland and
Clarington Catholic District School Board**



Stakeholder Participation

In addition to the legislated public meetings, the Ministry encourages school boards to include relevant stakeholders in the EDC process and discussions. Local developers or development associations, as well as municipalities, should be contacted in advance of the public meetings to ensure they are aware of the proposed EDC and bring to light any potential issues, etc. It is essential that stakeholders are part of the process and that the discussions remain transparent at all times to help ensure a smooth passage of the EDC by-law.

The PVNCCDSB and the KPRDSB have worked together closely on the preparation of the EDC background study and by-laws to ensure consistency in the included data and assumptions used in the calculation of the charges. Growth forecasts used for the EDC analysis are consistent with the most recent and available municipal forecasts.

The Boards have notified area stakeholders of their intent to begin the EDC renewal process. The Boards will continue to reach out to stakeholders, provide information as it becomes available and hold information sessions with stakeholders as deemed necessary.

Exemptions

The EDC by-law is subject to certain statutory exemptions for both residential and non-residential collection. The exemptions for residential development deal with residential intensification and replacement of units. If a new unit is added to an existing dwelling unit, for example, a single detached unit is converted to a duplex, the additional unit is exempt from EDCs. Section 3 of O. Reg. 20/98 sets out the classes of residential buildings and the maximum number of dwelling units that can be added under the exemption.

The legislation also allows for exemptions dealing with the replacement of residential units when the unit has been destroyed by fire, demolition or otherwise, or has been rendered uninhabitable, subject to certain conditions prescribed under section 4 of O. Reg. 20/98.

Non-residential statutory exemptions deal similarly with additions/enlargements of space and replacement of existing non-residential space that has been destroyed. A non-residential development that includes the enlargement of existing industrial space,



up to 50% of the gross floor area (GFA) of the existing development, is exempt from EDCs as per section 257.55 of Division E of the *Education Act*. Replacement of non-residential building space is exempt from EDCs if the existing space was destroyed by fire, demolition or otherwise, or has been rendered uninhabitable, subject to certain conditions in section 5 of O. Reg. 20/98.

In addition to the exemptions mentioned, the legislation allows for a limited non-residential exemption for certain institutional developments. Section 257.54 (5) of the *Education Act* stipulates that, “No land, except land owned by and used for the purposes of a board or municipality, is exempt from an EDC under a by-law passed under subsection (1) by reason only that it is exempt from taxation under section 3 of the *Assessment Act*.”

School boards may also decide to impose their own non-statutory exemptions to certain developments, both residentially and non-residentially. These types of exemptions may be for developments like seniors’ housing, social housing or recreational developments. Non-statutory exemptions are entirely at the discretion of the board and any EDC revenues lost as a result cannot be recovered.

Expiration

A school board can specify any date as the expiration date of the EDC by-law as long as the term of the by-law does not exceed five years. The exception to this rule is that the EDC by-law of one school board automatically expires on the same date as an existing by-law of a coterminous school board if they are in force in any part of the same area. Section 17 of O. Reg. 20/98 prescribes the conditions dealing with this special rule of expiry of by-laws.

Collection

The EDC is collected by local municipalities on behalf of the school boards at the time a building permit is issued. The funds are deposited into an EDC reserve fund. The municipality, under the legislation, cannot issue a building permit if the EDC has not been paid. In addition to collecting the charge and transferring the monies to the school boards, municipalities are also required to provide the boards with detailed reports respecting all EDC transactions (section 20 of O. Reg. 20/98). At a minimum, each report should cover the total EDCs that have been collected, the number of building



permits issued (or GFA for non-residential), any exemptions granted and any permits that were issued without an EDC being paid.

The municipalities do not receive any remuneration for collecting EDCs on behalf of the school boards; however, municipalities are allowed to retain any interest earned on the monthly EDC balances.

2.4 Appeals and Amendments

Appeals

The EDC by-law can be appealed by any individual or organization in accordance with the provisions in the *Education Act*. Sections 257.64 to 257.69 of the Act outline the legislation dealing with the appeal of the EDC by-law. The by-law is subject to appeal for a maximum of 40 days after the by-law has been passed. The school boards must provide a written notice that an EDC by-law has been passed (within 20 days of passage) and this notice must include information on how to file an appeal.

An appeal of an EDC by-law goes to the Ontario Land Tribunal (OLT)^[1] to be decided. All appeals must be filed in writing with the secretary of the school board within the allotted time allowed. The reasons for the appeal must be included in the notice. It is the responsibility of the secretary of the school board to forward a copy of the Notice of Appeal to the OLT within 30 days after the last day of the appeal period. In addition to the Notice of Appeal, the secretary must provide:

- A copy of the by-law certified by the secretary;
- A copy of the background study;
- An affidavit or declaration certifying that notice of the passing of the by-law was provided in accordance with the *Education Act*; and
- The original or true copy of all written submissions and material relevant to the by-law.

After hearing an appeal, the OLT may decide to:

- Dismiss the appeal in whole or in part.

^[1] The Ontario Land Tribunal (OLT), formerly known as the Local Planning Appeal Tribunal (LPAT) and, earlier, as the Ontario Municipal Board (OMB),



- Order the board to repeal or amend the by-law.
- Repeal or amend the by-law itself.

If the by-law is repealed, the EDCs that have already been paid must be refunded. If the by-law is amended and the amended charge is lower than the original charge, the difference must be refunded. All refunds are due within 30 days of the by-law being repealed or amended. While the OLT does have the power to repeal or amend the by-law, they are not able to increase the quantum of the charge, remove or reduce the scope of discretionary exemptions or change the expiration date of the by-law.

Amendments

The EDC legislation gives school boards the authority to amend their by-laws. Section 257.70 (1) of the Act states: “Subject to subsection (2), a board may pass a by-law amending an education development charge by-law.” There are certain limitations to an EDC amendment, specifically laid out in section 257.70 (2) of the Act, as follows:

A board may not amend an education development charge by-law so as to any one of the following more than once in the one-year period immediately following the coming into force of the by-law or in any succeeding one-year period:

- Increase the amount of an EDC.
- Remove or reduce the scope of an exemption.
- Extend the term of the by-law.

There are a variety of reasons why school boards may feel the need to amend their by-law. School boards may be paying more for school sites than what was estimated in the EDC and may need to increase their land cost assumptions, or they may need to change a discretionary exemption. The board does not need Ministry approval to pass an amending by-law; however, boards are required to provide proper notice proposing an amendment and of the amendment itself. Boards are also required to ensure that the original EDC background study is available, as well as any additional information that would explain the reason for the amendment. A public meeting is not required to pass an amending by-law, but it is recommended.



Chapter 3

The Process and Methodology for Calculating an Education Development Charge



3. The Process and Methodology for Calculating an Education Development Charge

The following chapter will outline the procedures and methodologies utilized to calculate the EDC. As mentioned earlier in this report, the EDC calculation is formulaic and technical in nature and encompasses three main components – demographic projections, determination of need (new school sites), and the associated costs.

3.1 Eligibility

School boards must meet certain criteria or “triggers” to be eligible to impose EDCs. The first criterion deals with the board’s average projected enrolment compared to its OTG capacity. The second set of criteria, available only to school boards with an existing in-force by-law, deals with outstanding EDC financial obligations.

Capacity Trigger

If a school board’s average elementary or secondary enrolment on a jurisdiction-wide basis over the five years following the proposed by-law passage is greater than the board’s elementary or secondary OTG capacity, then it is eligible to impose an EDC. Qualification on either panel allows the board to impose EDCs throughout its jurisdiction for both elementary and secondary new school sites. Form A of the EDC submission sets out the board’s projected average daily enrolment over the proposed five-year term of the EDC by-law (2021 to 2025, inclusive), as compared to the board’s OTG capacity on both the elementary and secondary panels.

The board’s OTG capacity for the EDC is based on the Ministry-approved permanent capacity according to the School Facilities Inventory System on the proposed date the new by-law is to come into force. Additional adjustments may be made to the capacity figure used in the study, in consultation with Ministry staff and for circumstances such as:

- OTG capacity of schools that are transferred from one panel to the other within 12 months of by-law passage may be attributed to the panel the school will be used for after the transfer is complete. Boards must have passed a resolution for this to take effect.



- The capacity of all schools or additions under construction and that are planned for opening within 12 months of the by-law coming into force are to be included in the capacity determination.
- Purpose-built space that cannot be reasonably used to accommodate pupils from new growth may be excluded from the permanent capacity determination.
- The capacity of a leased school must be included if the school has a “New Pupil Place” capacity attributed to it. The “New Pupil Place” capacity is the capacity used in the determination of Ministry grants.
- Any schools that have been closed (in accordance with the board’s school closure policy) may be excluded from the permanent capacity. In addition, if a school is scheduled to close during the tenure of the by-law (with board-passed resolution) then the capacity may also be excluded.

The permanent capacity used for the PVNCCDSB is **10,585** spaces on the elementary panel and **5,286** on the secondary panel. Comparably, the KPRDSB has determined a permanent capacity of **25,195** on the elementary panel and **12,444** on the secondary panel in the County/City of Peterborough.

Both Boards meet the capacity trigger on the elementary panel within the County/City of Peterborough. The PVNCCDSB’s average projected enrolment from 2021/22 to 2025/26, jurisdiction-wide, is **10,732** compared to a capacity of **10,585**, for a deficit of 147 spaces. For the KPRDSB, the Board’s average projected enrolment is **25,997** compared to the capacity of **25,195**, leaving a deficit of **802** spaces.

On the secondary panel, both Boards’ 2021/22 to 2025/26 averages result in surplus spaces and do not meet the capacity trigger. For the PVNCCDSB, the five-year secondary enrolment average is calculated at **5,018** compared to the capacity of **5,286**. This results in **268** surplus secondary spaces. For the KPRDSB, the five-year enrolment average is calculated at **10,500**, resulting in **1,944** surplus spaces.

Form A from the EDC Ministry Submission for both Boards can be found on the following pages.



Figure 3-1: Peterborough Victoria Northumberland and Clarington Catholic District School Board – Form A

A.1.1: CAPACITY TRIGGER CALCULATION - ELEMENTARY PANEL

Elementary Panel Board-Wide EDC Capacity	Projected Elementary Panel Enrolment						Elementary Average Projected Enrolment Less Capacity
	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Average Projected Enrolment Over Five Years	
10,585.0	10,485	10,582	10,753	10,816	11,021	10,732	147

A.1.2: CAPACITY TRIGGER CALCULATION - SECONDARY PANEL

Secondary Panel Board-Wide EDC Capacity	Projected Secondary Panel Enrolment						Secondary Average Projected Enrolment Less Capacity
	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Average Projected Enrolment Over Five Years	
5,286.0	4,765	4,902	4,990	5,175	5,258	5,018	-268



Figure 3-2: Kawartha Pine Ridge District School Board – Form A

A.1.1: CAPACITY TRIGGER CALCULATION - ELEMENTARY PANEL

Elementary Panel Board-Wide EDC Capacity	Projected Elementary Panel Enrolment						Elementary Average Projected Enrolment Less Capacity
	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Average Projected Enrolment Over Five Years	
25,195.0	25,000	25,485	26,024	26,484	26,993	25,997	802

A.1.2: CAPACITY TRIGGER CALCULATION - SECONDARY PANEL

Secondary Panel Board-Wide EDC Capacity	Projected Secondary Panel Enrolment						Secondary Average Projected Enrolment Less Capacity
	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Average Projected Enrolment Over Five Years	
12,444.0	10,013	10,361	10,571	10,715	10,841	10,500	-1,944



Financial Obligations

A school board that has an existing EDC by-law in place, and has outstanding financial obligations related to its existing by-law that exceed the balance of the EDC reserve fund, is eligible to impose EDCs. It is possible for a board to have sufficient capacity to accommodate projected enrolment, yet still be obligated to pay for sites that have been purchased as a result of a growth-related need. Outstanding financial obligations can result from a board not having collected enough revenue because of growth shortfalls or an increase in land prices, or if a board has purchased school sites earlier than what was projected in the background study.

This financial obligation eligibility trigger was added to the original capacity trigger criteria with an amendment to O. Reg. 20/98 and came into force on March 12, 2002.

For school boards to qualify under this trigger, an EDC financial obligation must be demonstrated in the background study including the following required information:

- The board must have a previous by-law in effect after September 1, 1999.
- Funds borrowed from the EDC reserve fund must be reconciled back.
- Copies of Appendices D1 and D2 must be provided.
- A transaction history of EDC financial activity must be provided from the last Appendix D1 and Appendix D2 statements to proposed by-law implementation.
- A repayment schedule outlining the elimination of the EDC financial obligation must be provided.

An outstanding EDC financial obligation exists if the adjusted outstanding principal as per Appendix D of the board's financial statements (plus any adjustments made), is greater than the adjusted EDC reserve fund balance. **Since there is no EDC currently in place for the County or City there cannot be outstanding EDC financial obligations and so this criterion is not relevant for the present evaluation.**

3.2 Demographic Projections

The demographic projections respecting school enrolment, and housing and population growth form an important basis for the entire EDC analysis. These projections ultimately determine eligibility, need, and the final quantum of the charge. The housing unit forecasts contained in this study are consistent with the most recent municipal



forecasts that were available at the time of study. Background, methodologies, and overviews of both the enrolment and housing forecasts can be found in Chapter 4 of this report.

The demographic projection requirements of the EDC consist of three distinct components: projecting the number of annual building permits that will be issued for new dwelling units and new non-residential space; projecting enrolment of the existing community; and projecting enrolment from new housing growth.

New Dwelling Units

The number of new dwelling units in the area governed by the EDC by-law must be estimated for each of the next 15 years. The forecast is set out by three types of development, low density (single and semi-detached houses), medium density (townhouses) and high density (apartments) and is broken down by the school board review areas that were outlined earlier in this report in section 1.4.

The forecast is set out by varying types of development for two reasons. The first is that different types of development produce school-aged children in different ways. Lower-density developments typically produce greater numbers of school-aged children than do apartments. Defining various types of developments allows for greater accuracy when projecting the number of new pupils arising from new developments. The second reason is to allow for the calculation of a differentiated charge should the Boards choose to do so. Each Board has the ability to charge a uniform EDC rate across all types of development – meaning that the EDC is one rate for a single detached unit or an apartment – or can choose to charge separate rates depending on the type of development.

There are certain situations, as defined by the legislation, where specific developments are exempt from EDCs, such as housing intensification. The forecast of *net new dwelling units* should ensure that these exempt units are factored into any forecast and excluded.

Existing Community Projections and Projections of New Pupils

The enrolment projections required in order to calculate EDCs must be made up of two distinct projections, one for the existing community and one for pupils from new housing growth. This is done because ultimately the number of total growth-related pupils must



be offset by any available pupil places that are not required by pupils of the existing community in year 15 of the forecast. The existing community projection must estimate, by school, the number of students for 15 years based on the number of existing students today and assuming no additional new housing growth. The Board's total OTG capacity of the review area (as of by-law inception) less the projected number of existing community pupils in the review area in year 15, is the Board's *total available space*.

The determination of pupils from new development is based on the aforementioned housing forecast and the use of pupil yield factors. Pupil yields are mathematical representations of the number of school-aged children that will be generated by a particular dwelling over the planning forecast and that will attend a particular school board. Pupil yields used in this analysis are based on Statistics Canada data and Board historical enrolment information. Multiplying the pupil yield factors by the appropriate type of developments in the net new dwelling forecast determines the projected pupils from new development.

To determine the total *net growth-related pupil place requirements*, the available pupil places (total available space referenced above) must be subtracted from the total pupils projected from new development. Enrolment projections and the determination of net growth-related pupil places can be done on a jurisdiction-wide basis or on a review area basis. The EDC analysis in this study is based on a review area approach.

Site Needs

The final “planning” or “forecasting” step in the EDC process is to determine a board's site needs, specifically the number, location, and size of sites for new growth-related schools. The calculation of net growth-related pupil place requirements ultimately determines the number of necessary sites and their size. The regulation governing the EDC provides a table of maximum sizes depending on the number of pupil places that will be constructed. These tables can be found on the following page.

While the calculations shown in the tables ultimately determine the amount/size of land that will be necessary for new school sites, the legislation also recognizes that there may be situations in which the necessary site for a new school may exceed the size specified in the table. For example, a board may need a larger site to accommodate



certain municipal requirements or Ministry initiatives. Should a site exceed the legislative requirements, justification must be included in the EDC background study.

Table 3-1: Elementary School Maximum Area to Pupils

Number of Pupils	Maximum Area (acres)
1 to 400	4
401 to 500	5
501 to 600	6
601 to 700	7
701 or more	8

Table 3-2: Secondary School Maximum Area to Pupils

Number of Pupils	Maximum Area (acres)
1 to 1,000	12
1,001 to 1,100	13
1,101 to 1,200	14
1,201 to 1,300	15
1,301 to 1,400	16
1,401 to 1,500	17
1,501 or more	18

Form G of the Ministry EDC Forms submission provides specific details on each site the Board is proposing to acquire to construct new schools. On a site-by-site basis, Form G provides information on the general location of the site (by review area or greater detail, if available), the proposed size of the new school, the approximate timing of site purchase as well as the percentage of the site that is considered EDC eligible. The Ministry also recommends that proposed site purchases for new schools are consistent with the Board's long-term accommodation plans.



3.3 Growth-related Net Education Land Costs

The planning or forecasting component of the EDC analysis is critical to determining the overall EDC-eligible needs of the Boards. To finalize the calculation process of the EDC, these accommodation needs must be translated into financial requirements. The analysis in the previous section determined the total growth-related pupil needs as well as the amount of land (in acres) that will be required to accommodate those pupils. EDC-eligible expenses are determined by attaching costs to acquire and service the land needed.

Land acquisition costs have been determined by qualified appraisers and the methodologies used as well as relevant data can be found in Chapter 5 of this report. Servicing costs are based on historical costs provided by the school boards with respect to sites that have been recently developed. Once costs for each site have been finalized, the next step is to determine the percentage of each site that is EDC eligible. This is based on the percentage of net growth-related students that make up the total capacity of the proposed new school. For example, if the new proposed school had a capacity of 450, and 400 of the spaces were accounted for by new growth-related pupils, then the site would be 88.88% eligible for EDCs ($400/450 = 88.88\%$).

In addition to site acquisition and servicing costs, there are other EDC-eligible expenses that can be included in the analysis. Examples of other EDC-eligible costs include:

- Interest and borrowing costs related to site acquisition;
- Land escalation costs;
- Costs related to the preparation and distribution of EDC background studies;
- Costs related to studies of land being considered for acquisition (environmental assessments); and
- Costs to service/prepare land for construction (grading, service lines, etc.).

Outstanding Financial Obligations

In addition to the costs that have been outlined above, any outstanding financial obligations from previous by-laws are also eligible education land costs. A negative balance in the Boards' EDC reserve funds, established for the area to which the proposed by-laws will apply, is considered an outstanding financial obligation and can be added to the total net education land costs. It should be noted that if the Boards



have a positive balance in their EDC reserve funds, these funds must be used to defray any EDC-eligible expenditures. The total eligible costs are referred to as the *total growth-related net education land costs*.

3.4 Determination of the Charge

Once the total growth-related net education land costs have been determined, there are certain prescribed steps that must be followed to determine the actual quantum of the EDC. As discussed in Chapter 2, the legislation allows school boards to determine the type of EDC it will impose. Boards can impose EDCs on residential or non-residential developments and can also charge a uniform rate for all types of developments or can differentiate the rate based on dwelling unit types.

Apportionment of Land Costs

The legislation allows school boards to allocate up to 40% of their education land costs to non-residential development. If a school board had a non-residential component to their EDCs, then the land costs would be multiplied by whatever percentage the board deemed to be apportioned to non-residential. For example, if the total land costs were estimated to be \$1 million and the non-residential allocation was 10%, then the *non-residential growth-related net education land costs* would total \$100,000. The remaining balance would make up the *residential growth-related net education land costs*.

To determine the residential charge (assuming a uniform charge), the total residential growth-related net education land costs are divided over the projected number of net new dwelling units assumed in the EDC forecast over the next 15 years. The result is the amount of the uniform residential EDC per dwelling unit. If charges are to be imposed on non-residential development, there are two ways in which they can be calculated. If the board chooses to use a non-residential forecast of GFA, then the total non-residential growth-related net education land costs are divided by the estimated GFA of the proposed non-residential developments. The board can also choose to use a non-residential forecast of estimated declared values where the non-residential land costs are divided by the projected declared values and multiplied by 100 to get a non-residential charge.



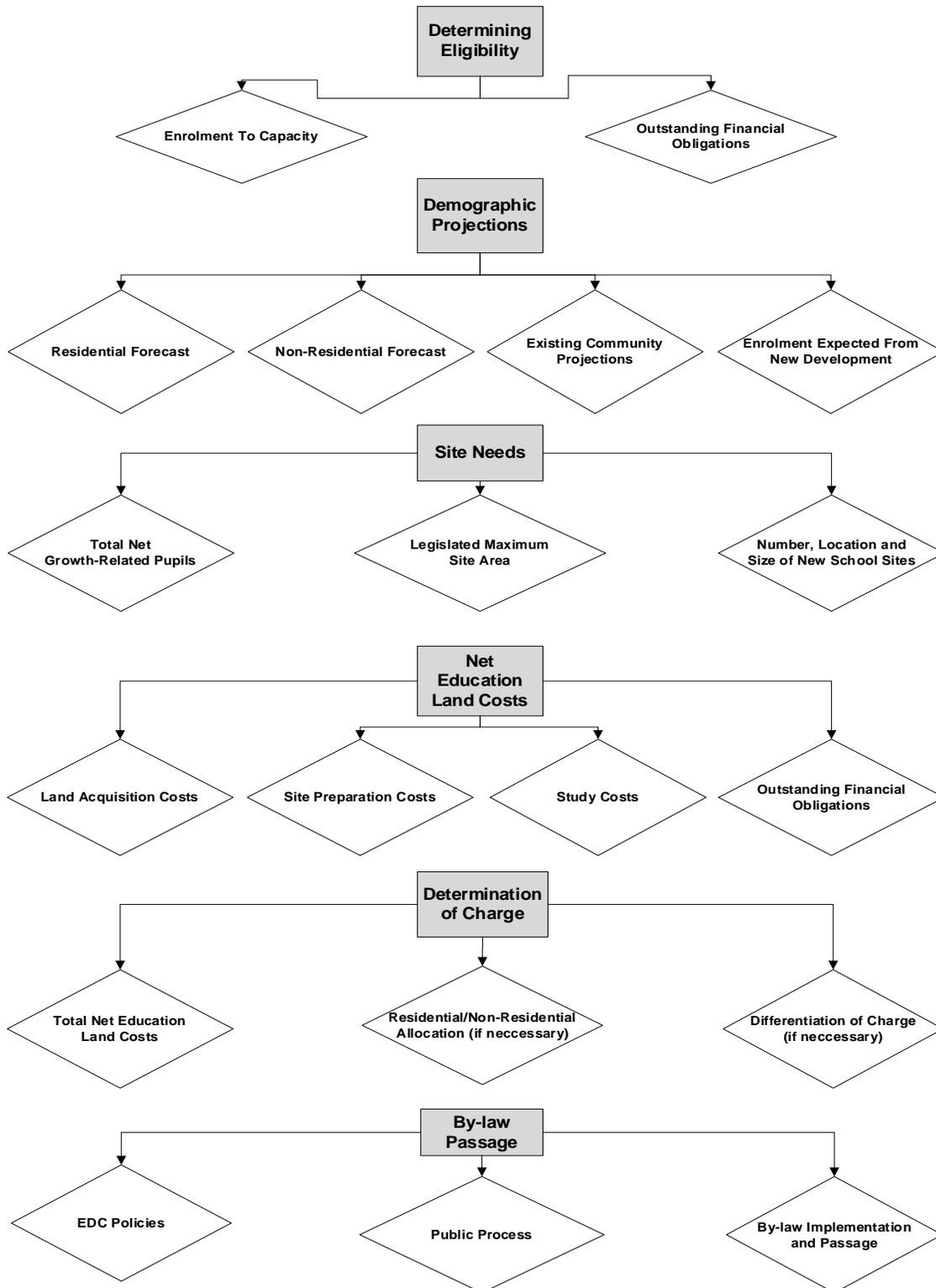
Once the residential charge is determined, it can be charged uniformly across all types of development or different rates can be charged depending on the types of units being built. If the EDC is applied in a uniform manner, then the total residential land costs are simply divided over the estimated net new dwelling units as described earlier. If the board chooses to impose a differentiated EDC, then the charges are apportioned on the basis of different unit types producing different amounts of pupils. Boards may choose to define developments as they wish (i.e., low density, high density, condos, apartments, single family, etc.) but are encouraged to stay as consistent as possible with categories used by the municipalities impacted by the by-law.

A distribution factor is determined by the distribution of growth-related pupils amongst the various unit types defined by the board. For example, if 100 students were from low-density developments, 50 from medium-density developments and 10 from high-density developments, the distribution factors would be 62.5% for low density (100/160), 31.25% for medium density and 6.25% for high density. These distribution factors are then multiplied by the total residential land costs to determine the apportioned residential land costs by development type. Each separate amount is then divided by the number of net new units for the particular development type to arrive at the *differentiated residential EDC per unit by development type*.

A flow chart detailing the EDC process can be found on the following page. In addition, the Ministry EDC Forms, which detail the calculations required to determine the EDC, can be found in Appendix A at the end of this report.



EDC Process and Methodology





Chapter 4

Demographic Projections



4. Demographic Projections

As mentioned earlier in the report, the demographic projections form the backbone of the EDC analysis in that they are used to determine eligibility, need and ultimately the quantum of the charge itself. The demographic projections for an EDC consist of both forecasts of new housing development as well as projections of school enrolment. Projections of both new housing and enrolment must be provided on an annual basis for a 15-year period following by-law imposition.

The following chapter provides the methodology and background to the demographic projections as well as the results of those projections for the City and County of Peterborough.

4.1 The Residential and Non-Residential Growth Forecast

4.1.1 Residential

The residential growth forecast for the EDC is critical to the analysis because of the direct link between new homes and new pupils for the school board. In addition to determining a board's needs, the number of net new projected units in the forecast serves as the denominator in the final calculation of the residential charge (i.e. net education land costs / net new projected units). The dwelling unit forecast contained in this study provides a projection of the number of units on an annual basis for the next 15 years by low- (single/semis), medium- (townhouses) and high-density (apartments) allocations as well as seasonal dwellings. O. Reg. 20/98 section 7 (1) states that a board must "estimate the number of new dwelling units in the area in which charges are to be imposed for each of the 15 years immediately following the day the by-law comes into force."

Housing development and occupancy patterns have changed significantly over the last decade. Housing developments are offering more choice in terms of density, like singles, townhouses and apartments, as well as developments that cater to specific lifestyles or age groups (retirement residences). Policies such as those set out in the *Places to Grow* initiative by the provincial government mandate that future developments will provide more units on less land, increasing the likelihood of more urban type developments and infilling projects in the future. The combination of new initiatives, societal shifts in housing, and economic changes associated with COVID-19



have posed a set of unique challenges for municipalities in the area to develop long-term population and housing projections.

The development projections contained in this study are derived from recently drafted growth forecasts completed for the both the City and County of Peterborough, as part of their development charge background study and other growth-related studies that incorporate local residential and employment targets. In addition, supplementary data in regard to recent historical building activity (building permits), servicing and land supply data were reviewed. The forecast information may be supplemented with other relevant data garnered from historical building permit issuance, small area development plans and prior conversations/meetings with local planning departments.

According to information from municipal building permit data, the County of Peterborough and the City of Peterborough (C/C Peterborough) have combined an averaged of approximately 672 new permits for residential construction from 2016 to 2020. Residential building activity in the C/C Peterborough has fluctuated over the last five years, ranging from a low of 556 in 2017 to a high of 806 permits more recently in 2020 (range of 250 units).

Table 4-1: County of Peterborough & City of Peterborough Historical Building Permit Issuance

Year	Area	Total
2016	C/C Peterborough	676
2017	C/C Peterborough	556
2018	C/C Peterborough	695
2019	C/C Peterborough	626
2020	C/C Peterborough	806
2016-2020	C/C Peterborough	3,359
	<i>Average</i>	<i>672</i>

The City's and Counties growth forecasts project moderate growth over the next few decades with an average of approximately 932 new dwelling units per year from 2021/22 to 2035/36 (15-year EDC forecast term). A slight shift in future development is expected to occur in the type of units being built with 65% anticipated to develop as low



density (single- and semi-detached, 14% medium density (townhouses) and 21% as high density (apartments).

Table 4-2: Residential Forecast
County of Peterborough and City of Peterborough Residential Forecast
2021/22 to 2035/36

Housing Type	# of Units	% By Density
Low Density (Singles/Semis)	9,026	65%
Medium Density (Townhouses)	2,025	14%
High Density (Apartments)	2,924	21%
<i>Total</i>	13,975	100%

The final growth forecast for the County and City of Peterborough EDC estimates **13,975** new residential units to be built over the next 15 years. Of these new units, 65% are estimated to be low density, 14% medium density and 21% high density. This amounts to an annual average of **932** units for the 15-year EDC term. This rate of residential development is expected to remain fairly stable but will increase gradually over time. The first five years of the forecast will average a slightly lower number of new builds at **901** per year, whereas in the last five years of the forecast period (between years 10 and 15) the forecast average is **963** per units per year. Forecasts for both School Boards by elementary review area and density type can be found as part of the Ministry Forms package in Appendix A.

In order to account for intensification of units, which are exempt from EDCs, an adjustment to the projections was made to derive the “net” new units housing forecast. This adjustment is intended to estimate the number of units in the forecast that will be created by intensification – transforming an existing single-family home into duplex/ apartment type units. The overall forecast was reduced by approximately 1.5% to estimate the number of exempt units and resulted in a projection of **13,765** net new units.

4.1.2 Non-residential

The non-residential growth forecast provides a basis for calculating a non-residential EDC, should boards elect to impose such a charge.



O. Reg. 20/98 s. 7 (11), states,

“If the charges are to be imposed on non-residential development, the board shall determine the charges, which shall be expressed as a rate to be applied to the board-determined GFA of the development and shall satisfy the following requirements:

- i. The rate shall be the same throughout the area in which charges are to be imposed under the by-law.
- ii. The rate shall be a rate determined such that it does not exceed the maximum rate, which is determined for each year of the proposed by-law by taking the lesser of,
 - A. the rate that, if applied over the period referred to in paragraph 1 to the estimated non-residential development in the area to which the by-law would apply and for which charges may be imposed, would not exceed the percentage of the forecasted growth-related net education land cost that is to be funded by charges on non-residential development, and
 - B. the rate determined under paragraph 12.”

The non-residential forecast for the County of Peterborough and City of Peterborough totals **8,306,145** sq.ft. of GFA over the next 15 years. As with the residential forecast, assumptions must be made respecting certain exemptions of GFA. Industrial additions (up to 50% of existing floor area) and certain institutional properties (municipal and school board properties) are exempt under the legislation. Utilizing historical Statistics Canada data on non-residential construction by type, **2,582,849** sq.ft. (approximately 31%) were exempt from this forecast and the total “net” new non-residential forecast totals **5,723,297** sq.ft. of GFA.

4.2 Enrolment Projections

Enrolment projections for the purposes of the EDC analysis are completed as two separate components – enrolment of the existing community and enrolment expected from new housing growth. The enrolment projections of the existing community are based on a scenario of no new housing growth and examine projected enrolment of the existing population. The projections of enrolment from new housing focus on pupils that are generated from expected new housing developments. EDC-eligible growth-related



pupils must be offset by any available space in the existing community, hence the necessity of examining enrolment projections utilizing the two separate components.

Enrolment projections have been prepared for each review area within the County/City of Peterborough. The existing community projections have been prepared for each of the Boards' schools included in the EDC analysis. The projections of enrolment from new housing growth are provided on a review area basis.

The enrolment projections also assume that students are accommodated in their home attendance areas. This means that students currently in a holding situation at a school outside their home school boundary are returned to their home boundary. Holding situations typically arise when students in a development area await new school construction and are "held" in nearby schools until the new school is open. Situations where students are permanently accommodated outside their home areas (i.e. program) are not affected.

Methodology

The prediction of school enrolment involves the consideration of a wide range of factors. There are three common methods of enrolment projection: rate of growth, enrolment ratios and grade transition. The rate of growth method assumes that past rates of enrolment growth or decline will carry forward. In today's changing demographic and economic landscape this method of enrolment forecasting is unreliable. The enrolment ratio method looks at historical ratios of school enrolment compared with the overall population and then carries forward these ratios, or makes assumptions about new ratios, and applies them to a population forecast. The grade transition method examines historical progression rates from grade to grade and makes assumptions about the retention of grades from one year to the next.

Watson used a combination of the latter two methodologies – enrolment ratio and grade transition – in conjunction with detailed demographic background data and historical Board enrolment to produce the enrolment forecast for the EDC. The enrolment projection methodology focuses on the relationships between demographic trends and actual historical enrolment of the Boards. The basis of the assumptions for future trends comes from the analysis of these historical relationships.



Demographic Background

A demographic profile is compiled for each review area within the Boards' jurisdictions using data from the 2001, 2006, 2011 and 2016 Census. Trends in the demographic data are used to highlight changes in population on both a review area and jurisdiction-wide basis. Examining these historical trends assists in providing perspective and direction when determining future assumptions for the projections.

The tables on the following pages depict the demographic trends for the County and City of Peterborough. The total population of the County and City of Peterborough grew by 5.4% between 2001 and 2006, and between 2006 and 2011. This is slightly below Ontario's overall growth rate in that period (6.6% between 2001 and 2006; 5.7% between 2006 and 2011) but is more consistent with the Canada-wide growth rate of 5.4% from 2001 to 2006, and 5.9% from 2006 to 2011. Growth in the County/City of Peterborough has slowed slightly in recent years, with a population increase of 2.3% between 2011 and 2016. This is lower than provincial and national rates during this period, which were 4.6% and 5.0%, respectively.

The elementary school-aged population (4-13 years) is particularly important from a school board's perspective – the size of this cohort decreased significantly in the County/City of Peterborough from 2001 to 2006, falling by 28.4%. This age cohort has rebounded since then, growing by 10.1% between 2006 and 2011 and by 7.7% between 2011 and 2016. Despite this recovery, the size of this cohort was 13,544 in 2016, which is lower than the 2001 figure of 15,945 (a net decrease of 2,401). The secondary school-aged population (14-18) exhibited the reverse trend – it increased by 32.2% from 2001 to 2006 and decreased by 31.7% from 2006 to 2011, and again decreased by 15.7% from 2011 to 2016. As with the elementary-aged population, the size of this cohort has diminished overall, with a net decrease of 2,163 between 2001 and 2016.

In addition to the school-aged populations, the pre-school-aged population and the number of females aged 25-44 are both important as they are excellent indicators of what is expected to happen in the school-aged population in the short to mid-term. The pre-school population will be entering the school system in the next few years, and females between 25 and 44 years of age are said to be in their prime child-bearing years. Examining these groups can provide insight into future births and the population of school-aged children. The pre-school-aged population fell slightly by 2.8% from 2001



to 2006, but it has since been growing. The number of children in this cohort increased by 13.8% between 2006 and 2011, and then by 2.5% in the 2011 to 2016 period. Meanwhile, the number of females aged 25-44 decreased by 5.7% from 2001 to 2006, and again by 4.3% from 2006 to 2011. It then increased by 1.6% from 2011 to 2016, for a total incremental decrease of 1,366 between 2001 and 2016.

Table 4-3: County of Peterborough and City of Peterborough Demographic Profile, 2001 to 2016

Population Data	2001 Census	2006 Census	2011 Census	2016 Census
Total Population	125,897	132,730	135,060	138,226
Pre-School Population (0-3)	4,656	4,525	5,150	5,281
Elementary School Population (4-13)	15,945	11,421	12,573	13,544
Secondary School Population (14-18)	9,068	11,991	8,190	6,905
Population Over 18 Years of Age	96,228	104,793	109,147	112,496
Females Aged 25-44	16,397	15,460	14,798	15,031

*Derived by Watson & Associates Economists Ltd. 2020, using Statistics Canada Census DA level Single Year of Age data.

Table 4-4: County of Peterborough and City of Peterborough Population Change, 2001 to 2016

Population Data	2001-06 Abs. Change	2001-06 % Change	2006-11 Abs. Change	2006-11 % Change	2011-16 Abs. Change	2011-16 % Change
Total Population	6,833	5.4%	2,330	5.4%	3,166	2.3%
Pre-School Population (0-3)	-131	-2.8%	625	13.8%	131	2.5%
Elementary School Population (4-13)	-4,524	-28.4%	1,152	10.1%	971	7.7%
Secondary School Population (14-18)	2,923	32.2%	-3,801	-31.7%	-1,285	-15.7%
Population Over 18 Years of Age	8,565	8.9%	4,354	4.2%	3,349	3.1%
<i>Females Aged 25-44</i>	-937	-5.7%	-662	-4.3%	233	1.6%

A description of the relevant population-age cohorts is as follows:

- Pre-school aged (0-3) – used as a lead indicator of potential anticipated enrolment in the short term.



- Elementary (4-13) – represents the predominant age structure of the students who attend elementary schools.
- Secondary (14-18) – represents the predominant age structure of the students who attend secondary schools.
- Adult (18+) – reflects the segment of the population that does not attend elementary or secondary school.

The Enrolment Projection Process

Determining Entry Year Enrolment

One of the most important and most difficult components of the enrolment forecast is predicting entry year enrolment for the junior kindergarten (JK) grade. Much of the overall projection relies on the assumptions made with regard to pupils entering the system. To develop forecasts for the JK grade, a review of historical births, pre-school population (0-3 years old), and historical JK enrolment is undertaken. The participation rates of a board's JK grade enrolment of the 4-year-old population are examined from one Census period to the next to determine future participation ratios.

In addition, a population forecast of the pre-school and school-aged population (0-18 years) by single year of age is prepared for the study area. This forecast is based on the population trends in the 2001, 2006, 2011 and 2016 Census periods, as well as other relevant demographic trends in the area. Recent fertility and death rates are applied to the 2016 Census population and the population is aged to provide future births and future school-aged population.

The challenge in this population forecast is to exclude growth/development in this phase of the forecast. The total enrolment forecast is divided into two separate components – existing enrolment and enrolment from future housing. To account for this, trends are examined for 2001, 2006, 2011 and 2016 Census populations to estimate levels of growth and migration that occurred between the Census periods. Assumptions arising from this examination are used to “strip” growth/migration from the projected population forecast to ensure that growth is not double counted.

Comparing historical JK enrolment to actual population provides ratios that are used to determine future JK enrolment from the projected 4-year-old population in the review area. This determines the projected JK pupils for the review area for the forecast period. These overall JK students then need to be allocated to their respective schools



in the review area. This allocation is based on historical shares combined with any board information on recent openings/closures or program changes that may affect future share. Table 4-5 depicts an example of JK/Elementary participation rates between 2006 and 2016.

Table 4-5: An Example of Junior Kindergarten/Elementary Participation Rates (2006 to 2016)

Single Year of Age	2006	2011	2016
0	286	261	274
1	317	291	274
2	316	296	290
3	315	355	297
4	340	288	285
5	362	328	305
6	363	391	358
7	356	350	374
8	324	372	387
9	321	364	393
10	327	378	334
11	388	365	448
12	336	350	409
13	346	323	384
JK Headcount Enrolment	172	150	145
Elementary Enrolment	1,567	1,591	1,760
JK Participation	51%	52%	51%
Elementary Participation	45%	45%	48%

At this stage of the projections, each school in a review area will have a projected number of JKs for the forecast period. The next step then involves using the grade transition method to advance each grade from one year to the next. For every school in the system, retention rates from grade to grade are calculated and applied to grade enrolments as they are advanced through each projection year. Each school and community can be unique when it comes to grade retention. For example, the ratio of senior kindergarten (SK) students to JK students is often higher in the more rural areas and an indication that more students routinely enter the SK grade than would be expected, given the JK count from the previous year. Programs, such as French Immersion, can also have a significant impact on grade-to-grade retention. Table 4-6 provides a generic example of retention rate calculations based on historical enrolment.



Table 4-6: Retention Rate Example

Year	Year	Year	Grade	Historical: 2011 2012	Historical: 2012/ 2013	Historical: 2013/ 2014	Historical: 2014/ 2015	Historical: 2015/ 2016	Historical: 2016/ 2017
5	4	2	JK	1,484	1,562	1,539	1,559	1,605	1,730
111%	112%	110%	SK	1,720	1,611	1,745	1,750	1,696	1,797
110%	111%	112%	1	1,613	1,859	1,787	1,919	1,929	1,915
104%	103%	102%	2	1,847	1,682	1,949	1,866	1,947	1,994
104%	104%	104%	3	1,982	1,911	1,765	2,016	1,934	2,047
103%	103%	103%	4	1,971	2,004	1,953	1,846	2,067	1,990
103%	103%	103%	5	2,119	2,058	2,082	2,011	1,895	2,128
102%	102%	103%	6	2,151	2,145	2,093	2,123	2,051	1,953
101%	101%	102%	7	2,184	2,144	2,174	2,114	2,148	2,093
101%	102%	102%	8	2,120	2,210	2,194	2,178	2,145	2,193

Historical enrolment trends, overall participation rates/enrolment share as well as the overall demographics of the area are all examined in conjunction with the ratio of the projected enrolment to the population. This examination looks at the reasonableness of the projections and expected ratios and assumptions in light of recent historical trends.

Secondary Enrolment Projections

The secondary enrolment projections are based largely on the elementary projections and how the elementary students transition into the secondary panel. Each secondary school of the board is assigned feeder elementary schools which form a “family” of schools based on board data. As grade 8 students graduate, they are assigned to their respective secondary schools. If grade 8 students can attend more than one secondary school, they are then allocated based on recent trends.

The other factor involved in projecting the entry year grade for secondary schools (grade 9) involves the concept of open access. In Ontario, students are permitted to attend the secondary school of their choice, regardless of religious requirements and assuming there is space and program availability. To account for this in the projections, the predicted grade 9 enrolment at a given secondary school based on its feeder schools and historical retention rates is compared to the actual grade 9 enrolment at the



school. This ratio provides an approximation of the net students lost or gained due to open access.

The other important variable that is considered in the secondary enrolment projection methodology is the impact of the fifth year of secondary school being eliminated in 2003/04. The elimination of the fifth year of study does not mean that grade 12 students are not allowed to come back for a fifth year of study. There are still instances where grade 12 students may come back to finish the four-year program in five years or to upgrade or retake certain courses. The percentage of students that are coming back for a fifth year varies throughout the Province and even from school to school within a board. The projections in this analysis typically utilize a three-year average of grade 12 retention rates (putting greater emphasis on the last year or two) as well as input from the school boards on their experiences and expected future trends.

The remainder of the secondary projection follows the same methodology used in the elementary projections. Grades are advanced by applying historical grade transition rates for each school in the system. Assumptions are derived using historical ratios of enrolment to population and are used to ensure that projected secondary enrolment relates back to the projected secondary populations.

Examining Historical Enrolment Trends

Historical enrolment provides trends that are used to help form assumptions for projected enrolment and provides an important basis to determine relationships with demographic data. The historical data can provide details on things like how enrolment changes compare with the changes in the school-aged populations in the same area, how different sized grade cohorts are moving through the system, and how enrolment has changed in light of new housing activity.

An important indicator when examining historical enrolment is the ratio of senior elementary enrolment compared to junior elementary enrolment. This ratio provides a quick “snapshot” of the current enrolment structure and can provide a short-term outlook of expected enrolment.

The comparison is made between the senior elementary grades (6-8) and the junior elementary grades (JK-1). Assuming full day JK and SK, an equal number of pupils entering JK-1 to those moving through the senior elementary grades would result in a ratio of 1. If the ratio is higher than 1, it indicates that more pupils are leaving the



elementary system or school than are entering, and could be an indicator of future enrolment decline, at least in the short term and absent of mitigating factors. A ratio lower than 1 indicates possible enrolment growth (at least in the short term) and is typically found in growing areas where housing attracts young couples or young families with children.

Table 4-7 depicts the historical GSR within the County and City of Peterborough for the PVNCCDSB. The ratio of senior to junior elementary enrolment based on 2006/07 enrolment was 1.26, and 0.94 based on 2011/12 enrolment. More recently, the GSR has increased slightly to 0.98 in 2016/17.

Table 4-7: County of Peterborough and City of Peterborough PVNCCDSB Total

GRADES	2006/ 2007	2011/ 2012	2016/ 2017
JK	352	427	446
SK	389	432	444
1	362	427	455
2	381	396	444
3	373	424	436
4	366	403	475
5	437	419	459
6	450	393	465
7	491	419	415
8	443	400	436
SE	16	14	5
ALT/OTH	0	0	0
TOTAL	4,056	4,154	4,480
RATIO	1.26	0.94	0.98

The ratio of senior to junior elementary enrolment for the KPRDSB in the County of Peterborough has been steadily declining. The Grade Structure Ratio (GSR) was 1.33 based on 2006/07 enrolment; it was 1.12 in 2011/12 and decreased further in 2016/17 to 0.90. Table 4-8 outlines historical enrolment and historical grade ratios for the KPRDSB.



Table 4-8: County of Peterborough and City of Peterborough KPRDSB Total

GRADES	2006/ 2007	2011/ 2012	2016/ 2017
JK	643	765	784
SK	731	764	847
1	787	705	848
2	788	735	845
3	866	716	824
4	897	711	840
5	885	749	778
6	958	794	724
7	962	803	751
8	962	903	751
SE	0	50	93
ALT/OTH	238	0	0
TOTAL	8,714	7,695	8,085
RATIO	1.33	1.12	0.90

The Impact of Enrolment Share

Board enrolment share refers to the share or percentage of total enrolment a board receives between itself and its coterminous English language board. Changes in enrolment share can have significant impacts on board enrolment. For example, increases in enrolment share can help mitigate declines or even increase enrolment in areas where the total school-aged population is in decline.

Table 4-9 provides the historical elementary enrolment of the KPRDSB and the PVNCCDSB within the County and City of Peterborough. PVCNCCDSB has been gaining an increasing share of enrolment over the past decade, serving 32% of elementary students in 2006/07, which increased to 35% in 2011/12 and again to 36% in 2016/17. Corresponding KPRDSB shares fell, from 68% in 2006/07, to 65% in 2011/12, and to 64% in 2016/17.



Table 4-9: Elementary Historical Enrolment

Elementary Panel

SCHOOL BOARD	2006/07	2011/12	2016/17
PVNCCDSB TOTAL	4,056	4,154	4,480
KPRDSB TOTAL	8,714	7,695	8,085
TOTAL OF BOTH BOARDS	12,770	11,849	12,565
PVNCCDSB SHARE	32%	35%	36%
KPRDSB SHARE	68%	65%	64%

The secondary panel enrolment shares in the County/City of Peterborough were quite stable during this period. PVNCCDSB saw its share of secondary enrolment increase from 30% in 2006/07 to 33% in 2011/12, and then fell to 31% in 2016/17. In turn, KPRDSB saw its share decrease from 70% in 2006/07 to 67% in 2011/12, and then increase to 69% in 2016/17.

Table 4-10: Secondary Historical Enrolment

Secondary Panel

SCHOOL BOARD	2006/07	2011/12	2016/17
PVNCCDSB TOTAL	2,116	2,004	1,694
KPRDSB TOTAL	4,942	4,153	3,684
TOTAL OF BOTH BOARDS	7,058	6,157	5,378
PVNCCDSB SHARE	30%	33%	31%
KPRDSB SHARE	70%	67%	69%

Enrolment Expected from New Housing

The second phase of the enrolment projection methodology involves predicting housing growth in the study area and its impact on school enrolment. Earlier in this chapter the residential unit growth forecasts were explained in detail. The residential unit forecast is used as the basis to predict future school enrolment from growth. Historical levels of occupancy by school-aged children and by housing type provide us with factors and trends that allow us to make assumptions about how new units might produce children in the future.



From an occupancy point of view, the number of people per housing unit has been declining in practically every part of the Province over the last decade or longer. In addition, the number of school-aged children per household has also been in sharp decline. New units today are not producing the same number of people or the same number of children as they have historically.

Each unit in the residential forecast is multiplied by a factor to predict the number of school-aged children who will come from the projected number of units. To derive this pupil generation factor, the methodology involves using custom Census data prepared specifically for Watson by Statistics Canada. The Census data provides information with respect to the number of pre-school-aged and school-aged children who are currently living in certain types and ages of dwelling units. For example, the data is able to provide the number of children aged between 4 and 13 years who live in single detached dwellings that are between one and five years old for any Census tract in the study area.

Pupil yields were derived for both the elementary and secondary panels, for low-, medium- and high-density housing types for each review area in each Board's jurisdiction. The pupil yields and trends can vary significantly from area to area in a board's jurisdiction. In this way, factors are derived and applied to the appropriate growth forecast to get a forecast of school-aged children from new development. This new development forecast must then be adjusted to reflect only the enrolment for the subject board. Using historical apportionment and population participation rates, the enrolment forecast is revised to capture the appropriate share for the board.

The PVNCCDSB's total yields (Table 4-11) for the elementary panel range between 0.043 in the City of Peterborough, to 0.121 in Southwest Peterborough. Secondary yields are around 0.03 throughout the County and City. For the KPRDSB, the total yields for the elementary panel are 0.157 in Peterborough County and City – Southwest, and 0.149 in Peterborough County and City – Southeast (Table 4-12). Comparably, on the secondary panel, its total yield is 0.115 throughout the County/City.

The flowchart presented in Figure 4-1 outlines the process of projecting enrolment from new development.



Table 4-11: PVNCCDSB – Growth-Related Pupil Yields

**Table 4-11.1: PVNCCDSB – Elementary Growth-Related Pupil Yields
Form E – Growth-Related Pupils – Elementary Panel**

Review Area	Dwelling Unit Type	Elementary Pupil Yield
Peterborough County and City Southwest	Low Density	0.079
	Medium Density	0.079
	High Density	0.016
	Total	0.071
Peterborough County and City Southeast	Low Density	0.135
	Medium Density	0.102
	High Density	0.024
	Total	0.121
Peterborough County and City Northwest	Low Density	0.071
	Medium Density	0.077
	High Density	0.016
	Total	0.059
Peterborough County Northeast	Low Density	0.059
	Medium Density	0.056
	High Density	0.012
	Total	0.043

**Table 4-12.2: PVNCCDSB – Secondary Growth-Related Pupil Yields
Form E – Growth-Related Pupils – Secondary Panel**

Review Area	Dwelling Unit Type	Elementary Pupil Yield
South Peterborough	Low Density	0.030
	Medium Density	0.036
	High Density	0.010
	Total	0.028
North Peterborough	Low Density	0.034
	Medium Density	0.042
	High Density	0.012
	Total	0.030



Table 4-12: KPRDSB – Growth-Related Pupil Yields

**Table 4-12.1: KPRDSB – Elementary Growth-Related Pupil Yields
Form E – Growth-Related Pupils – Elementary Panel**

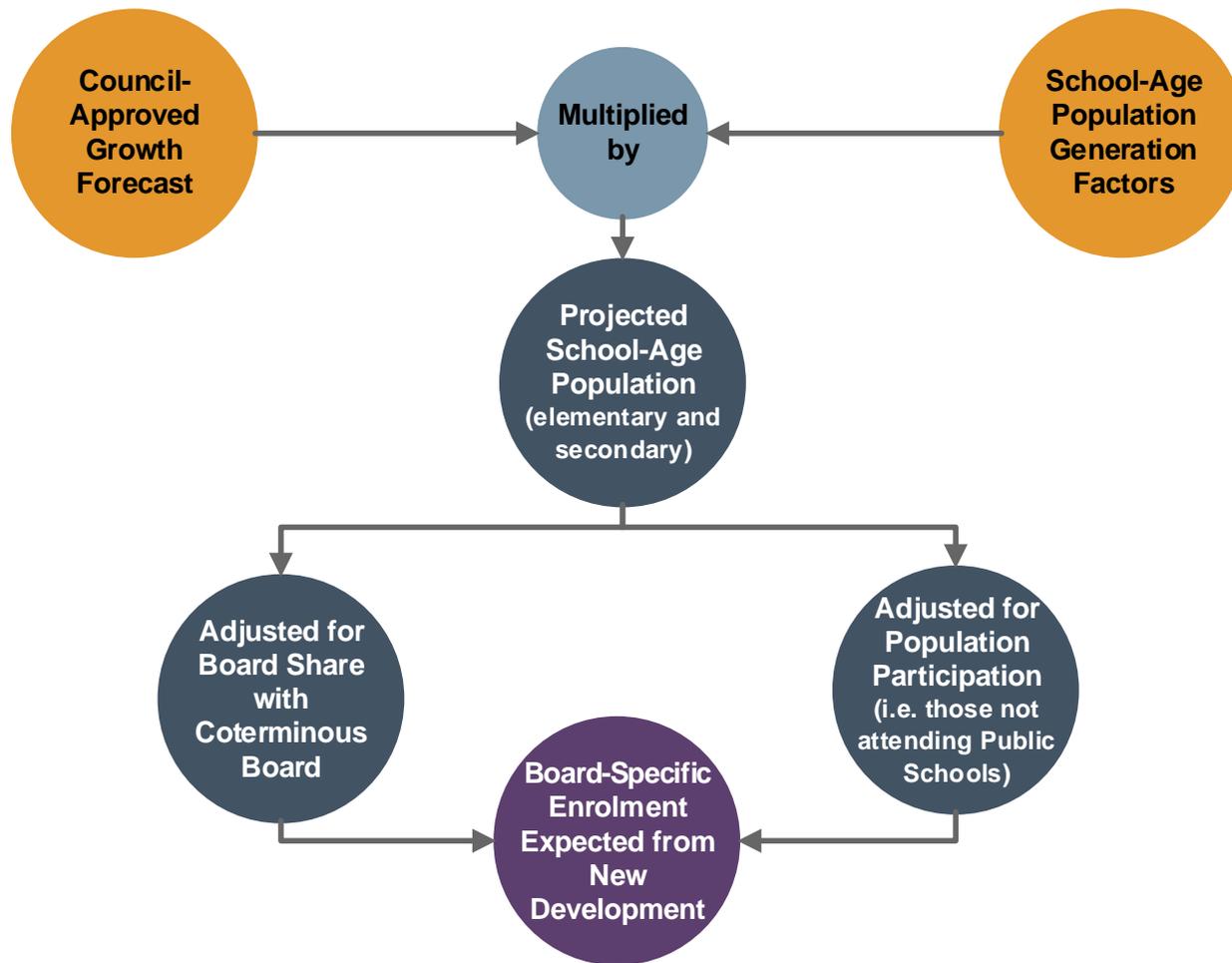
Municipality	Dwelling Unit Type	Elementary Pupil Yield
Peterborough County and City - Southwest	Low Density	0.208
	Medium Density	0.105
	High Density	0.040
	Total	0.157
Peterborough County and City - Northeast	Low Density	0.191
	Medium Density	0.081
	High Density	0.037
	Total	0.149

**Table 4-12.2: KPRDSB – Secondary Growth-Related Pupil Yields
Form E – Growth-Related Pupils – Secondary Panel**

Municipality	Dwelling Unit Type	Secondary Pupil Yield
Peterborough County and City	Low Density	0.154
	Medium Density	0.096
	High Density	0.036
	Total	0.115



Figure 4-1: Enrolment Expected from New Development





Is the EDC Forecast Reasonable in Comparison to Other School-Aged Forecasts?

The aforementioned methodology describes the process in which enrolment projections are derived; however, before the projections can be finalized there is one final step. The projections are compared with an accepted school-age forecast for the Boards' EDC jurisdictions to determine the reasonableness of the projections. The Board projections are built back up to a total school-aged population forecast using assumptions on apportionment and participation rates.

The projections are compared to the most recent available forecasts in the Boards' jurisdictions. These can include Ministry of Finance population projections, Statistics Canada population projections, Official Plan projections, etc. If the enrolment projections and the population forecast have similar long-term trends, further adjustment is unlikely. Should there be significant differences between the two forecasts, however, adjustments may be made to the enrolment projections to ensure consistency with the population forecast.

This final adjustment ensures that the projected enrolment for the School Boards maintains similar long-term trends and assumptions consistent with other governments/agencies in the Boards' jurisdictions.

4.3 Summary of Projected Enrolment

The total EDC enrolment projections for the County and City of Peterborough indicate that by the end of the forecast period (2035/36) the PVNCCDSB will have a total elementary enrolment in the County/City of Peterborough of 5,087, compared to the 2020/21 enrolment of 4,486, for a total increase of 602 pupils or 13%. On the secondary panel, enrolment is expected to increase from 1,769 in 2020/21 to 2,143 at the end of the EDC term, for a total increase of 374 pupils or approximately 21%.

The KPRDSB can expect a total elementary enrolment of 11,404 by the 2035/36 school year. This represents a total increase of 2,699 pupils, or approximately 31% from 2020/21. On the secondary panel, enrolment is expected to increase by about 54%, with a 2020/21 enrolment of 3,368 increasing to 5,186 by the end of the 15-year forecast term. A summary of the projected enrolment by Board, review area and panel can be found in Table 4-13 below.



Table 4-13: Peterborough Victoria Northumberland and Clarington Catholic DSB Enrolment Projections

Review Area	Year 1 2021/22	Year 5 2025/26	Year 10 2030/31	Year 15 2035/36
ERA01	1,450	1,413	1,448	1,489
ERA02	722	770	915	1,077
ERA03	1,881	1,891	1,915	1,945
ERA04	498	537	561	575
TOTAL	4,551	4,611	4,839	5,087

Review Area	Year 1 2021/22	Year 5 2025/26	Year 10 2030/31	Year 15 2035/36
SRA01	726	721	736	842
SRA02	1,119	1,148	1,186	1,301
TOTAL	1,845	1,869	1,922	2,143

Table 4-14: Kawartha Pine Ridge DSB Enrolment Projections

Review Area	Year 1 2021/22	Year 5 2025/26	Year 10 2030/31	Year 15 2035/36
ERA01	6,288	6,662	7,291	7,641
ERA02	2,961	3,333	3,601	3,763
Total	9,249	9,996	10,892	11,404

Review Area	Year 1 2021/22	Year 5 2025/26	Year 10 2030/31	Year 15 2035/36
SRA01	3,605	4,285	4,757	5,186
Total	3,605	4,285	4,757	5,186



Chapter 5

Education Development Charge Calculation



5. Education Development Charge Calculation

Once eligibility has been determined, the charge is calculated using the aforementioned forecasts and methodologies. The calculation is dependent on the growth/enrolment forecasts to project need, the valuation of land and services to assign a cost to that need, and the residential and non-residential forecast to provide a quotient to determine the final quantum of the charge. O. Reg. 20/98, section 7 provides the basis under which the EDC is determined. The following section will explain and highlight the specific calculation components of the EDC.

5.1 The Projections

The residential dwelling unit forecasts, as well as the non-residential GFA forecasts that were used in the EDC analysis, are explained in detail in section 4.1 and outlined below.

Residential Unit Forecasts

County and City of Peterborough	2021/22-2035/36
TOTAL PROJECTED UNITS	13,975
TOTAL NET NEW UNITS	13,765

Non-Residential Unit Forecasts

County and City of Peterborough	2021/22-2035/36
TOTAL PROJECTED UNITS	8,306,145
TOTAL NET GFA	5,723,297

Net Growth-related Pupil Places

The projected school board enrolments as well as the residential forecasts determine the net growth-related pupil places which in turn determine the number of EDC-eligible sites. Form E of the EDC Ministry Submission for each Board and each panel is set out



below. These forms highlight, by review area, the net number of units, the Board pupil yields and the growth-related pupils, and can be found in Table 5-1 and Table 5-2.

The PVNCCDSB projections forecast a total of 656 elementary net growth-related pupils and 242 secondary pupils in the County and City of Peterborough. Comparably, the KPRDSB's enrolment projections predict 1,493 net growth-related pupils on the elementary panel and 860 on the secondary panel in the County and City of Peterborough.



Table 5-1: PVNCCDSB EDC Submission 2021 – County of Peterborough and City of Peterborough, Form E Growth-Related Pupils

Peterborough Victoria Northumberland and Clarington Catholic District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form E - Growth-Related Pupils - Elementary Panel

Peterborough Victoria Northumberland and Clarington Catholic District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form E - Growth-Related Pupils - Secondary Panel

Elementary Planning Area	Dwelling Unit Type	Net New Units	Elementary Pupil Yield	Elementary Growth-Related Pupils	Secondary Planning Area	Dwelling Unit Type	Net New Units	Secondary Pupil Yield	Secondary Growth-Related Pupils
Peterborough County and City Southwest	Low Density	719	0.079	57	South Peterborough	Low Density	2,962	0.031	91
	Medium Density	211	0.079	17		Medium Density	421	0.032	14
	High Density	143	0.016	2		High Density	500	0.010	5
	Total	1,074	0.071	76		Total	3,884	0.028	109
Peterborough County and City Southeast	Low Density	2,795	0.135	377	North Peterborough	Low Density	6,064	0.034	206
	Medium Density	294	0.102	30		Medium Density	1,394	0.038	54
	High Density	357	0.024	8		High Density	2,424	0.011	27
	Total	3,446	0.121	416		Total	9,882	0.029	286
Peterborough County and City Northwest	Low Density	4,193	0.071	296					
	Medium Density	1,270	0.077	98					
	High Density	1,738	0.016	27					
	Total	7,201	0.059	422					
Peterborough County Northeast	Low Density	1,319	0.059	78					
	Medium Density	40	0.056	2					
	High Density	685	0.012	8					
	Total	2,045	0.043	89					
SUBTOTAL:				1,003	SUBTOTAL:				396
LESS: Available Pupil Places:				347	LESS: Available Pupil Places:				154
NET GROWTH-RELATED PUPILS:				656	NET GROWTH-RELATED PUPILS:				242



Table 5-2: KPRDSB EDC Submission 2021 – County of Peterborough and City of Peterborough, Form E Growth-Related Pupils

Kawartha Pine Ridge District School Board

Education Development Charges Submission 2021: City and County of Peterborough

Form E - Growth-Related Pupils - Elementary Panel

Kawartha Pine Ridge District School Board

Education Development Charges Submission 2021: City and County of Peterborough

Form E - Growth-Related Pupils - Secondary Panel

Elementary Planning Area	Dwelling Unit Type	Net New Units	Elementary Pupil Yield	Elementary Growth-Related Pupils	Secondary Planning Area	Dwelling Unit Type	Net New Units	Secondary Pupil Yield	Secondary Growth-Related Pupils
Peterborough County and City - Southwest	Low Density	5,997	0.208	1,245	Peterborough County and City	Low Density	9,026	0.079	715
	Medium Density	1,513	0.105	159		Medium Density	1,816	0.078	142
	High Density	1,950	0.040	77		High Density	2,924	0.023	67
	Total	9,460	0.157	1,481		Total	13,765	0.067	925
Peterborough County and City - Northeast	Low Density	3,029	0.191	580					
	Medium Density	303	0.081	24					
	High Density	974	0.037	36					
	Total	4,306	0.149	640					
SUBTOTAL:				2,122	SUBTOTAL:				925
LESS: Available Pupil Places:				628	LESS: Available Pupil Places:				65
NET GROWTH-RELATED PUPILS:				1,493	NET GROWTH-RELATED PUPILS:				860



5.2 Net Education Land Costs

The enrolment projections, the Boards' long-term accommodation plans, and the EDC analyses ultimately determine the number of EDC-eligible sites that are needed for new growth-related schools. Form F of the Ministry Submission outlines by review area the 15-year enrolment projections as well as the net growth-related pupil places. Form G of the Ministry Submission outlines the number of new sites that will be needed as well as the number of EDC-eligible acres of land that are required for those sites.

O. Reg. 20/98, section 7, specifically paragraphs 4-7, deals with the steps involved in moving from the site component of the calculation to the financial or costing component of the calculation. A cost must be attached to the value of the land that needs to be purchased, as well as the costs to provide services and prepare the land for construction. In addition, the balance of the existing EDC reserve funds must be calculated and incorporated into the analysis. Finally, the total eligible revenues, expenditures and existing deficits or surpluses are cash flowed over a 15-year period to determine the final charge.

Subsection 257.53 (2) specifically describes what education land costs are:

1. Costs to acquire land or an interest in land, including a leasehold interest, to be used by the board to provide pupil accommodation.
2. Costs to provide services to the land or otherwise prepare the site so that a building or buildings may build on the land to provide pupil accommodation.
3. Costs to prepare and distribute EDC background studies.
4. Interest on money borrowed to pay for costs described in paragraphs 1 and 2.
5. Costs to undertake studies in connection with an acquisition referred to in paragraph 1. N.B – Only the capital component of costs to lease land or to acquire a leasehold interest is an education land cost.



Site Valuation

Paragraph 4 of section 7 of O. Reg. 20/98 states that,

“The board shall estimate the net education land cost for the elementary school sites and secondary school sites required to provide pupil places for the new elementary school pupils and secondary school pupils.”

To determine the costs of land acquisition, both the KPRDSB and the PVNCCDSB retained the appraisal firm of Cushman & Wakefield. The appraisers were responsible for providing a land value per acre for each EDC-eligible site identified in the analysis. In addition, the appraisers were asked to provide an annual land escalation factor (for five years) to apply to the current land values.

The following approach to land valuation was undertaken by the appraisers:

The acreage rates for each site/district have been based on an examination of historic acquisition costs, pending acquisition agreements and options, and available sales data. The information regarding the sites has been provided by the Boards and has been relied upon as being accurate.

In addition, the values assume that the sites are zoned and serviced for residential development, notwithstanding the fact the many of the sites are still in the preliminary stages of planning – these “hypothetical” values are intended to capture the cost of land at the time the Board will be purchasing the sites to be used as schools.

In undertaking the appraisals, the two most common approaches to the valuation of development land were utilized and are summarized as follows:

- a) the **Direct Comparison Approach** which involves comparing or contrasting the recent sale, listing or optioned prices of comparable properties to the subject and adjusting for any significant differences between them; and,
- b) the **Land Residual Approach** (or Development Approach) which estimates land value based on determining selling prices of serviced lots and considers infrastructure costs and appropriate returns, rendering a “residual” land value component.

The strengths underlying the Land Residual Approach are that it more accurately reflects the specific development parameters of a site, while its



weaknesses relate to the preliminary nature of planning and engineering information available.

The strengths underlying the Direct Comparison Approach are that it more accurately reflects market attitudes to development land, while its weaknesses relate to the specifics of the subject properties, particularly those that are draft plan approved. For all the subject properties, except where noted, both approaches have been utilized.

The tables below set out the estimated EDC-eligible sites that the Boards will require in the 15-year analysis term and their appraised land values on per acre basis. These values were calculated in 2020 and do not include escalation, site improvements, land transfer taxes, HST (net of rebate) or other associated acquisition costs.

PVNCCDSB Sites

ELEMENTARY PANEL	Land Value/acre
ERA02	\$675,000
ERA03	\$675,000

SECONDARY PANEL	Land Value/acre
SRA02	\$675,000

KPRDSB Sites

ELEMENTARY PANEL	Land Value/acre
ERA01 (Owned)	\$0
ERA01	\$700,000
ERA01	\$675,000

SECONDARY PANEL	Land Value/acre
SRA01	\$675,000

Land Escalation Over the Forecast Period

As previously mentioned, the land values could include an annual land escalation rate to be applied to the acreage values in order to sustain the likely site acquisition costs over the next five years. In arriving at an escalation factor, the appraisers typically consider the recent historical general economic conditions at both the micro- and



macro-economic levels. Due to the economic conditions at the time the appraisals were completed, no escalation rates have been applied to the land values at this time.

Land Development and Servicing Costs

The *Education Act* includes the “costs to provide services to the land or otherwise prepare the site so that a building or buildings may be built on the land to provide pupil accommodation” as an EDC-eligible education cost. These costs typically include services to the lot line of the property, rough grading and compaction of the site and that the site is cleared of debris. Costs related to studies of land being considered for acquisition such as environmental assessments or soil studies are also considered to be EDC eligible.

Discussions with stakeholders and the Ministry of Education in past EDC by-law processes has resulted in a list that includes some of the primary development and servicing costs that are considered to be EDC eligible:

- Agent/commission fees to acquire sites;
- Municipal requirements to maintain sites prior to construction;
- Appraisal studies, legal fees;
- Expropriation costs;
- Site option agreements; and
- Land transfer taxes.

Based on recent historical site preparation costs, a figure of **\$82,147 per acre** for both PVNCCDSB and KPRDSB was used in the study. Using historical economic data and construction cost indices, an escalation factor of **3.1%** per annum was applied to the assumed per acre site preparation costs. Site preparation costs are escalated to the time of site purchase.

Total Land Costs

The total net education land costs, including the site acquisition costs, the escalation of land over the term of the by-law (five years), the site development/servicing costs, as well as associated financing costs and study costs, are projected to be approximately **\$8.0** million for the PVNCCDSB in the County and City of Peterborough, while the KPRDSB is projected to incur total education land costs of approximately **\$19.1** million



over the 15-year projection window of the proposed by-law in the County and City of Peterborough.

5.3 Reconciliation of the EDC Reserve Fund

Before the renewal of an EDC by-law, the final growth-related net education land costs must be adjusted by any deficit or surplus in the existing EDC reserve fund. Any outstanding EDC financial obligations that have been incurred by the board under a previous by-law are added to the total land costs. If there is a positive balance in the EDC reserve fund, this amount is subtracted from the total land costs and used to defray EDC-eligible expenditures.

Section 7, paragraphs 5-7 of O. Reg. 20/98 describe the process of deriving the final net education land costs.

“The board shall estimate the balance of the education development charge reserve fund, if any, relating to the area in which the charges are to be imposed. The estimate shall be an estimate of the balance immediately before the day the board intends to have the by-law come into force.”

“The board shall adjust the net education land costs with respect to any balance estimated under paragraph 5. If the balance is positive, the balance shall be subtracted from the cost. If the balance is negative, the balance shall be converted to a positive number and added to the cost.”

“The net education land cost as adjusted, if necessary, under paragraph 6, is the growth-related net education land cost.”

The reserve fund analysis summarizes the EDC collections (both actual and estimated) as well as the EDC costs that have been expended (both actual and estimated) and the estimated EDC reserve fund balance. It is based on the Ministry of Education Appendix D1 and Appendix D2 Forms that are prepared and submitted to the Ministry by all school boards with EDC by-laws in place. The balance from the most recent Appendix D1/D2 is used as the base point. The EDC reserve fund must also include certain estimates respecting revenues and expenditures to account for the most recent actual balance and the balance estimated to the new EDC by-law date.



As there is no EDC currently in place for the County or City of Peterborough, the reserve funds for both Boards are effectively zero—however, this calculation will be necessary upon renewal of the EDC by-law.

5.4 The Education Development Charge

The total land costs determine the total net education land costs for which EDCs may be imposed. The final steps in the process involve apportioning the land costs between residential and non-residential as well as differentiating the charge by development type, if necessary. The charge proposed in this background study is premised on a 90% residential/10% non-residential split—that is, 90% of the charge is based entirely upon growth-related net education land costs that are attributable to residential development and 10% to non-residential developments (commercial, industrial etc.). The final net education land costs that have been apportioned to residential (in this case 90%) are divided over the net new units from the dwelling forecast to determine a final EDC rate per dwelling unit and the costs attributed to non-residential development are divided over the forecast of net gross floor area (square feet) of projected non-residential space.

The net education land costs for the PVNCCDSB's by-law are estimated to be **\$8,009,616** and the number of net new units in the EDC forecast is projected to be **13,765**, resulting in a rate of **\$524** per dwelling unit and **\$0.14** per square foot of gross floor area.

The net education land costs for the KPRDSB's by-law are estimated to be **\$19,063,985** and the number of net new units in the EDC forecast is projected to be **13,765**, resulting in a rate of **\$1,246** per dwelling unit and **\$0.33** per square foot of gross floor area.

Tables for the proposed by-laws, shown below, outline the total growth-related net education land costs, the net new units, and the final EDC rates.



PVNCCDSB – County/City of Peterborough EDC
Calculation of Uniform 90% Residential

Residential Growth-Related Net Education Land Costs	\$7,208,655
Net New Dwelling Units (Form C)	13,765
Uniform Residential EDC Per Dwelling Unit	\$524

PVNCCDSB – County/City of Peterborough EDC
Calculation of Uniform 10% Non-Residential

Non-Residential Growth-Related Net Education Land Costs	\$800,962
Non-Exempt Board-Determined GFA (Form D)	5,723,297
Uniform Non-Residential EDC Per Square Foot of GFA	\$0.14

KPRDSB – County/City of Peterborough EDC
Calculation of Uniform 90% Residential

Residential Growth-Related Net Education Land Costs	\$17,157,587
Net New Dwelling Units (Form C)	13,765
Uniform Residential EDC Per Dwelling Unit	\$1,246

KPRDSB – County/City of Peterborough EDC
Calculation of Uniform 10% Non-Residential

Non-Residential Growth-Related Net Education Land Costs	\$1,906,399
Non-Exempt Board-Determined GFA (Form D)	5,723,297
Uniform Non-Residential EDC Per Square Foot of GFA	\$0.33

EDC Rate Phase-In

The final step in the EDC calculation is to determine the permitted phase-in of EDC rates. A new EDC rate can increase by a maximum of **\$300** per annum for the residential rate and **\$0.10** per annum for non-residential over either the existing or most recent EDC rates. Each school board does not currently have an EDC bylaw in-force but both school boards did have EDC bylaws at one time. The most recent EDC rates for the KPRDSB was \$136 per residential unit and \$0.04 per square foot of gross floor area. For the PVNCCDS, the most recent rates were \$62 per residential unit and \$0.02 per square foot of gross floor area. Based on the aforementioned most recent rates, the proposed new by-law rate would equal **\$436** per residential unit and **\$0.14** per square



proposed new by-law rate would equal **\$436** per residential unit and **\$0.14** per square foot of gross floor area for the KPRDSB in year 1. For PVNCCDSB, the proposed year 1 residential rate would be **\$362** and **\$0.12** per square foot of gross floor area for non-residential. The residential rate would then increase by a further **\$300** each year up to the maximum, and so in year 2 the PVNCCDSB would hit the maximum residential rate of **\$524** per unit (new proposed rate). The KPRDSB’s residential EDC rate would similarly increase by **\$300** each year until year 4, when it reaches its maximum, the new proposed rate of **\$1,246** per unit. The non-residential rate for PVNCCDSB would increase to **\$0.14** (the new proposed non-residential maximum rate) in year 2. For the KPRDSB, the non-residential rate would increase by the permitted **\$0.10** per year in years 2 and then hit the maximum or proposed rate of **\$0.33** in year 3. The EDC phase-in schedule is presented in Table 5-3, below.

Table 5-3: EDC Phase-in Schedule

Board	EDC Rate: Year 1	EDC Rate: Year 2	EDC Rate: Year 3	EDC Rate: Year 4	EDC Rate: Year 5	Maximum EDC Rate
RESIDENTIAL						
PVNCCDSB	\$362	\$524	\$524	\$524	\$524	\$524
KPRDSB	\$436	\$736	\$1036	\$1,246	\$1,246	\$1,246
NON-RESIDENTIAL						
PVNCCDSB	\$0.12	\$0.14	\$0.14	\$0.14	\$0.14	\$0.14
KPRDSB	\$0.14	\$0.24	\$0.33	\$0.33	\$0.33	\$0.33

The Cashflow Analysis

A cashflow analysis was completed, incorporating all eligible EDC expenditures, current reserve fund balances and land escalation factors, to determine the necessary revenues that will be collected through the imposition of EDCs. When revenue in any given year is insufficient to cover the expenditures, interim financing (on a short- or long-term basis) is assumed. The methodology used for the cashflow analysis is consistent with accounting practices used by many school boards, municipalities and financial lenders across the Province.



General Assumptions Used

The cashflow analysis must incorporate certain assumptions respecting interest rates, terms, escalation, etc. The table below outlines the general assumptions that have been used for the EDC analysis.

Site Acquisition Escalation Rate	0%
Site Preparation Escalation Rate	3.1% per annum
Debt Terms (term/rate)	10 Years at 3.00%

Description of Cashflow

The first section of the cashflow deals with **revenue** – there are two distinct components to the revenue section of the cashflow:

1. The first component deals with any short- or long-term debt the Boards incur. The total debt issuance for any given year will be identified in Lines 1 or 2 of the analysis.
2. The second component deals with the actual expected collections through the imposition of the EDC incorporating the annual net new dwelling unit forecast and non-residential forecast (if available). Projected EDC collections by year can be found on Lines 4, 5 and 6 of the cashflow.

The second section of the cashflow deals with **expenditures** – the eligible EDC expenditures incorporate the site acquisition and development costs, study costs and financing costs for incurred debt.

- Site acquisition costs are found on Line 8 of the analysis and are escalated for up to a five-year period (term of the by-law).
- Site preparation/development costs are found on Line 9 of the cashflow and are escalated up to the time of site purchase.
- Study costs (Line 10) are based on actual and projected Board data and are included for each expected subsequent by-law renewal (every five years).
- Long- and short-term financing costs (debt carrying costs) are found on Lines 11 and 12 of the cashflow analysis.



The final section of the cashflow provides the projected opening and closing balances of the EDC reserve fund incorporating any existing deficit or surplus as well as annual interest earnings on any balance in the account. Total borrowing, debt payments and outstanding debt can be found in the bottom right portion of the cashflow analysis.

Cashflows for each School Board (and by-law) are included in Tables 5-4 and 5-5 on the following pages.



Table 5-4: PVNCCDSB 15-Year Cashflow
County/City of Peterborough EDC By-law

Cash Flow Assumptions	
A. Reserve Fund Interest Rate	1.50%
B. Borrowing Rate	3.00%
C. Borrowing Term (Years)	5

		Year 1 2020/ 2021	Year 2 2021/ 2022	Year 3 2022/ 2023	Year 4 2023/ 2024	Year 5 2024/ 2025	Year 6 2025/ 2026	Year 7 2026/ 2027	Year 8 2027/ 2028	Year 9 2028/ 2029	Year 10 2029/ 2030	Year 11 2030/ 2031	Year 12 2031/ 2032	Year 13 2032/ 2033	Year 14 2033/ 2034	Year 15 2034/ 2035
Projected Revenues																
1	Long-Term Financing	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2	Short-Term Financing	\$0	\$0	\$0	\$0	\$600,000	\$0	\$0	\$0	\$0	\$0	\$1,900,000	\$0	\$0	\$0	\$0
3	<i>Subtotal (1 through 2)</i>	\$0	\$0	\$0	\$0	\$600,000	\$0	\$0	\$0	\$0	\$0	\$1,900,000	\$0	\$0	\$0	\$0
4	Education Development Charge Revenue (Res.)	524	per unit	\$456,928	\$460,803	\$464,415	\$469,543	\$473,678	\$476,103	\$479,660	\$483,741	\$487,876	\$489,435	\$496,700	\$498,217	\$499,734
5	Education Development Charge Revenue (Non-Res.)	0.14	per sq.ft	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239	\$95,239
6	<i>Subtotal EDC Revenue (4 + 5)</i>			\$552,167	\$556,042	\$559,654	\$564,782	\$568,917	\$571,943	\$575,959	\$579,988	\$583,997	\$587,997	\$591,997	\$595,997	\$599,997
7	Total Revenue (3 + 6)			\$552,167	\$556,042	\$559,654	\$564,782	\$568,917	\$571,943	\$575,959	\$579,988	\$583,997	\$587,997	\$591,997	\$595,997	\$599,997
Education Development Charge Expenditures																
8	Site Acquisition Costs (escalation rates included) ¹	\$0	\$0	\$0	\$0	\$2,762,260	\$0	\$0	\$0	\$0	\$1,344,474	\$2,450,007	\$0	\$0	\$0	\$0
9	Site Preparation Costs (escalation rates included) ¹	\$0	\$0	\$0	\$0	\$379,552	\$0	\$0	\$0	\$0	\$215,010	\$403,881	\$0	\$0	\$0	\$0
10	Projected Future Study Costs	\$0	\$0	\$0	\$0	\$75,000	\$0	\$0	\$0	\$0	\$75,000	\$0	\$0	\$0	\$0	\$75,000
11	Long-Term Debt Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
12	Short-Term Debt Costs	\$0	\$0	\$0	\$0	\$0	\$131,013	\$131,013	\$131,013	\$131,013	\$131,013	\$131,013	\$0	\$414,874	\$414,874	\$414,874
13	Total Expenditures (8 through 12)			\$0	\$0	\$3,216,812	\$131,013	\$131,013	\$131,013	\$131,013	\$131,013	\$1,765,497	\$2,853,888	\$414,874	\$414,874	\$489,874
Cash Flow Analysis:																
14	Revenues Minus Expenditures (7 - 13)			\$552,167	\$556,042	\$559,654	\$564,782	-\$2,047,895	\$370,930	\$374,947	\$378,504	\$382,585	-\$1,247,764	-\$429,356	\$116,923	\$118,440
15	Opening Balance (previous year's closing balance)	\$0	\$0	\$552,167	\$1,124,832	\$1,709,753	\$2,308,653	\$264,669	\$645,133	\$1,035,381	\$1,435,093	\$1,844,943	\$260,137	\$179,433	\$300,801	\$425,530
16	<i>Subtotal (14 + 15)</i>	\$0	\$552,167	\$1,108,209	\$1,684,486	\$2,274,535	\$260,758	\$635,599	\$1,020,080	\$1,413,885	\$1,817,678	\$597,179	\$176,781	\$296,356	\$419,241	\$545,487
17	Interest Earnings	\$0	\$16,623	\$25,267	\$34,118	\$3,911	\$9,534	\$15,301	\$21,208	\$27,265	\$33,322	\$39,379	\$45,436	\$51,493	\$57,550	\$63,607
18	Closing Balance (16 + 17)	\$0	\$552,167	\$1,124,832	\$1,709,753	\$2,308,653	\$264,669	\$645,133	\$1,035,381	\$1,435,093	\$1,844,943	\$260,137	\$179,433	\$300,801	\$425,530	\$553,669

¹ Land acquisition costs have not been escalated
Escalation rates for site preparation costs are applied to the date of acquisition and are escalated by 3.1% compounded annually.

Borrowing (Total of Line 3 and 4): \$2,500,000
Total Debt Payments: \$2,729,432
Outstanding Debt At End Of Forecast(15 years): \$414,874
Outstanding Debt Will Be Fully Funded In: 2035



Table 5-5: KPRDSB 15-Year Cashflow
County/City of Peterborough EDC By-law

Cash Flow Assumptions	
A. Reserve Fund Interest Rate	1.50%
B. Borrowing Rate	3.00%
C. Borrowing Term (Years)	5

	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Year 6 2026/ 2027	Year 7 2027/ 2028	Year 8 2028/ 2029	Year 9 2029/ 2030	Year 10 2030/ 2031	Year 11 2031/ 2032	Year 12 2032/ 2033	Year 13 2033/ 2034	Year 14 2034/ 2035	Year 15 2035/ 2036		
Projected Revenues																	
1 Long-Term Financing	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
2 Short-Term Financing	\$0	\$0	\$0	\$200,000	\$2,400,000	\$0	\$0	\$6,800,000	\$800,000	\$1,000,000	\$550,000	\$700,000	\$800,000	\$0	\$0		
3 Subtotal (1 through 2)	\$0	\$0	\$0	\$200,000	\$2,400,000	\$0	\$0	\$6,800,000	\$800,000	\$1,000,000	\$550,000	\$700,000	\$800,000	\$0	\$0		
4 Education Development Charge Revenue (Res.)	1,246	per unit	\$1,087,552	\$1,096,775	\$1,105,371	\$1,117,577	\$1,127,420	\$1,123,630	\$1,133,190	\$1,141,657	\$1,151,370	\$1,161,213	\$1,164,923	\$1,182,214	\$1,185,824	\$1,189,435	\$1,189,435
5 Education Development Charge Revenue (Non-Res.)	0.33	per sq.ft	\$226,682	\$226,682	\$226,682	\$226,682	\$226,682	\$71,063	\$71,063	\$71,063	\$71,063	\$71,063	\$83,535	\$83,535	\$83,535	\$83,535	\$83,535
6 Subtotal EDC Revenue (4 + 5)			\$1,314,234	\$1,323,457	\$1,332,053	\$1,344,259	\$1,354,101	\$1,194,693	\$1,204,253	\$1,212,720	\$1,222,433	\$1,232,275	\$1,248,458	\$1,265,750	\$1,269,360	\$1,272,970	\$1,272,970
7 Total Revenue (3 + 6)			\$1,314,234	\$1,323,457	\$1,332,053	\$1,544,259	\$3,754,101	\$1,194,693	\$1,204,253	\$8,012,720	\$2,022,433	\$2,232,275	\$1,798,458	\$1,965,750	\$2,069,360	\$1,272,970	\$1,272,970
Education Development Charge Expenditures																	
8 Site Acquisition Costs (escalation rates included) ¹	\$0	\$0	\$0	\$4,050,000	\$3,071,961	\$0	\$0	\$7,739,317	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9 Site Preparation Costs (escalation rates included) ¹	\$575,029	\$0	\$0	\$539,862	\$407,032	\$0	\$0	\$1,164,794	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10 Projected Future Study Costs	\$0	\$0	\$0	\$0	\$100,000	\$0	\$0	\$0	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0	\$0	\$100,000
11 Long-Term Debt Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
12 Short-Term Debt Costs	\$0	\$0	\$0	\$0	\$43,671	\$567,722	\$567,722	\$567,722	\$2,052,533	\$2,183,546	\$1,877,849	\$1,997,944	\$2,150,793	\$840,665	\$665,981	\$0	\$0
13 Total Expenditures (8 through 12)	\$575,029	\$0	\$0	\$4,589,862	\$3,622,664	\$567,722	\$567,722	\$9,471,833	\$2,052,533	\$2,283,546	\$1,877,849	\$1,997,944	\$2,150,793	\$840,665	\$765,981	\$0	\$0
Cash Flow Analysis:																	
14 Revenues Minus Expenditures (7 - 13)	\$739,205	\$1,323,457	\$1,332,053	-\$3,045,603	\$131,438	\$626,971	\$636,531	-\$1,459,113	-\$30,100	-\$51,270	-\$79,391	-\$32,195	-\$81,433	\$432,305	\$506,989	\$0	\$0
15 Opening Balance (previous year's closing balance)	\$0	\$739,205	\$2,093,602	\$3,477,040	\$437,909	\$577,887	\$1,222,931	\$1,887,354	\$434,665	\$410,633	\$364,753	\$289,642	\$261,309	\$182,574	\$624,102	\$624,102	\$624,102
16 Subtotal (14 + 15)	\$0	\$739,205	\$2,062,662	\$3,425,655	\$431,437	\$569,347	\$1,204,858	\$1,859,462	\$428,241	\$404,565	\$359,363	\$285,362	\$257,447	\$179,876	\$614,879	\$1,131,091	\$1,131,091
17 Interest Earnings	\$0	\$30,940	\$51,385	\$6,472	\$8,540	\$18,073	\$27,892	\$6,424	\$6,068	\$5,390	\$4,280	\$3,862	\$2,698	\$9,223	\$16,966	\$0	\$0
18 Closing Balance (16 + 17)	\$0	\$739,205	\$2,093,602	\$3,477,040	\$437,909	\$577,887	\$1,222,931	\$1,887,354	\$434,665	\$410,633	\$364,753	\$289,642	\$261,309	\$182,574	\$624,102	\$1,148,057	\$1,148,057

¹ Land acquisition costs have not been escalated
Escalation rates for site preparation costs are applied to the date of acquisition and are escalated by 3.1% compounded annually.

Borrowing (Total of Line 3 and 4): \$13,250,000
 Total Debt Payments: \$14,465,990
 Outstanding Debt At End Of Forecast(15 years): \$949,842
 Outstanding Debt Will Be Fully Funded In: 2038



Appendices



Appendix A

Education Development Charges Ministry of Education Forms Submission



Appendix A: Education Development Charges Ministry of Education Forms Submission

The Ministry of Education has prepared a set of standard forms that are required to form part of the EDC Background Study. The forms are used by the Ministry to review the EDC analysis and are standardized so that information is presented in a consistent manner for all school boards. The forms for each school board's EDC analysis are found in this appendix. In addition, a description of each form and its purpose can be found below.

FORM A1 AND A2

This form is used to determine whether a school board is eligible to impose EDCs. The A1 section of the form includes the board's approved OTG capacity for each panel as well as the projected five-year enrolment. If the average five-year projected enrolment is greater than the board's OTG capacity (on either panel), the school board is eligible to impose EDCs. The A2 section of the form deals with any outstanding EDC financial obligations. The form highlights any outstanding principal less the existing reserve fund balance. A positive financial obligation results in a board being eligible to impose future EDCs.

FORM B

Form B outlines the dwelling unit forecast that was used in the EDC analysis. The forecast is provided by EDC review area and by year for low-, medium- and high-density types of development.

FORM C

This form provides the net new dwelling units that are a requirement of the EDC analysis. Due to certain statutory exemptions (intensification) that were discussed earlier in this report, a certain percentage of units are removed from the forecast to determine the "net new units."

FORM D

This form provides the non-residential forecast of gross floor area in square feet over the next 15 years. In addition to providing the total projected square footage, this form



also includes an estimate as to the amount of square footage that is exempt from the forecast. Similar to the residential forecast, because of certain statutory exemptions, an assumption must be made regarding square footage that is excluded from the final EDC forecast.

FORM E

Form E provides the total number of growth-related pupils by EDC review area. The form includes the net number of units, associated pupil yields and the number of pupils by density type for both the elementary and secondary panels. The bottom of the form provides the total number of growth-related pupils less any existing available space to determine the total “net” growth-related pupils.

FORM F

These forms provide the total “net” growth-related pupil places on a review area basis. Each form provides a projection of the existing community enrolment by school for each of the 15 years in the EDC forecast as well as their current OTG capacities. In addition, the total projected enrolment expected from new development is provided for the total review area. The total requirements from new development less any available existing space are the net growth-related pupil places for that review area.

FORM G

Form G highlights the EDC-eligible sites that the board is proposing to purchase. Each site listing includes information on location, status, proposed school size and site size. The form also provides information on what percentage of each site is EDC eligible based on eligible pupil places as a percentage of the total proposed capacity of the school. In addition to providing site and eligibility information, Form G is noteworthy because it includes the translation from site requirements to site costs. On a site-by-site basis, the form highlights the expected per acre acquisition costs, site development costs as well as associated escalation and financing costs.

FORM H1 or H2

These forms outline the EDC calculation – Form H1 is used for a uniform EDC rate and Form H2 is used if the board is proposing a differentiated EDC rate. This EDC analysis assumes a uniform rate and includes Form H1. This form includes all relevant



information needed to calculate the final EDC. The total education land costs (derived from Form G) are added to any existing EDC financial obligations (Form A2) and study costs to determine the growth-related net education land costs for which EDCs may be collected. These costs must then be allocated to the proposed residential and non-residential splits. The amount determined to be borne by residential development (between 60% and 100%) is divided by the total net new units to determine a residential charge by unit.



**Peterborough Victoria Northumberland and Clarington
Catholic District School Board**

Education Development Charge Forms Submission

County of Peterborough and City of Peterborough

**Peterborough Victoria Northumberland and Clarington Catholic District School Board
Education Development Charges Submission 2021: City and County of Peterborough
Form A - Eligibility to Impose an EDC**

A.1.1: CAPACITY TRIGGER CALCULATION - ELEMENTARY PANEL

Elementary Panel Board-Wide EDC Capacity	Projected Elementary Panel Enrolment						Elementary Average Projected Enrolment Less Capacity
	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Average Projected Enrolment Over Five Years	
10,585.0	10,485	10,582	10,753	10,816	11,021	10,732	147

A.1.2: CAPACITY TRIGGER CALCULATION - SECONDARY PANEL

Secondary Panel Board-Wide EDC Capacity	Projected Secondary Panel Enrolment						Secondary Projected Enrolment Less Capacity
	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Average Projected Enrolment Over Five Years	
5,286.0	4,765	4,902	4,990	5,175	5,258	5,018	-268

A.2: EDC FINANCIAL OBLIGATIONS

Total Outstanding EDC Financial Obligations (Reserve Fund Balance):	\$ -
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**Peterborough Victoria Northumberland and Clarington Catholic District School Board
Education Development Charges Submission 2021: City and County of Peterborough
Form B - Dwelling Unit Summary**

PROJECTION OF GROSS NEW DWELLING UNITS BY ELEMENTARY EDC REVIEW AREA

	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Year 6 2026/ 2027	Year 7 2027/ 2028	Year 8 2028/ 2029	Year 9 2029/ 2030	Year 10 2030/ 2031	Year 11 2031/ 2032	Year 12 2032/ 2033	Year 13 2033/ 2034	Year 14 2034/ 2035	Year 15 2035/ 2036	Total All Units
Peterborough County and City Southwest																
Low Density	54	51	51	51	51	51	45	45	45	45	45	46	46	46	46	719
Medium Density	11	15	15	15	15	15	17	17	17	17	17	17	17	17	17	236
High Density	7	7	7	7	7	7	11	11	11	11	11	11	11	11	11	143
Total	72	73	73	74	74	74	74	1,098								
Peterborough County and City Southeast																
Low Density	172	170	171	174	173	172	174	175	176	205	206	206	206	207	207	2,795
Medium Density	8	8	8	8	8	9	9	9	9	41	42	42	42	43	43	328
High Density	20	20	20	21	24	24	24	25	25	25	26	26	26	26	26	357
Total	200	198	200	203	205	205	207	208	210	272	273	274	275	276	276	3,480
Peterborough County and City Northwest																
Low Density	280	286	289	292	289	289	292	296	299	276	256	262	262	263	263	4,193
Medium Density	98	100	101	103	104	105	106	108	110	78	80	80	81	82	82	1,417
High Density	97	98	99	100	109	109	111	111	112	114	134	135	136	136	136	1,738
Total	476	484	490	495	501	503	509	515	521	468	470	477	479	481	481	7,348
Peterborough County Northeast																
Low Density	95	95	95	96	96	93	93	92	92	92	72	77	77	77	77	1,319
Medium Density	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	45
High Density	39	39	39	39	39	39	39	39	39	39	59	59	59	59	59	685
Total	138	138	138	139	139	134	134	134	134	134	134	139	139	139	139	2,049
Total Jurisdiction																
Low Density	601	602	607	614	609	605	604	608	613	618	579	590	591	592	592	9,026
Medium Density	120	126	127	129	130	131	134	136	138	139	141	142	143	144	144	2,025
High Density	164	165	166	167	179	179	185	186	187	189	230	231	232	233	233	2,924
Total	885	893	900	910	918	915	923	930	938	946	949	963	966	969	969	13,975

**Peterborough Victoria Northumberland and Clarington Catholic District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form C - Net New Dwelling Units - By-Law Summary**

Elementary Planning Review Areas	Number of Units
Peterborough County and City Southwest	1,098
Peterborough County and City Southeast	3,480
Peterborough County and City Northwest	7,348
Peterborough County Northeast	2,049
Grand Total Gross New Units In By-Law Area	13,975
Less: Statutorily Exempt Units In By-Law Area	210
Total Net New Units In By-Law Area	13,765

**Peterborough Victoria Northumberland and Clarington Catholic District School Board
Education Development Charges Submission 2021: City and County of Peterborough
Form D - Non-Residential Development**

D1 - Non-Residential Charge Based On Gross Floor Area (sq. ft.)

Total Estimated Non-Residential Board-Determined Gross Floor Area to be Constructed Over 15 Years From Date of By-Law Passage:	8,306,145
Less: Board-Determined Gross Floor Area From Exempt Development:	2,582,849
Net Estimated Board-Determined Gross Floor Area:	5,723,297

Peterborough Victoria Northumberland and Clarington Catholic District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form E - Growth-Related Pupils - Elementary Panel

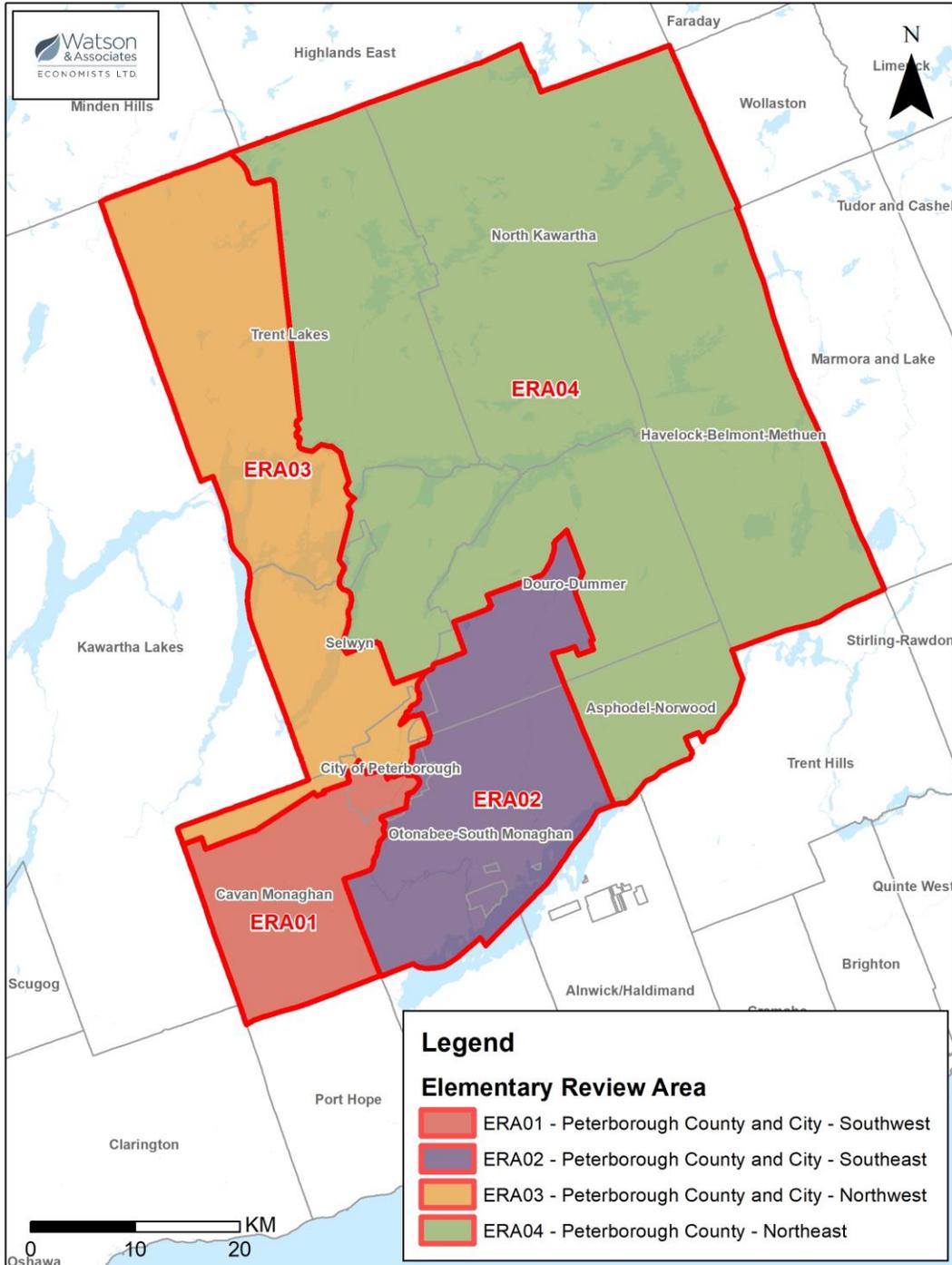
Elementary Planning Area	Dwelling Unit Type	Net New Units	Elementary Pupil Yield	Elementary Growth-Related Pupils
Peterborough County and City Southwest	Low Density	719	0.079	57
	Medium Density	211	0.079	17
	High Density	143	0.016	2
	Total	1,074	0.071	76
Peterborough County and City Southeast	Low Density	2,795	0.135	377
	Medium Density	294	0.102	30
	High Density	357	0.024	8
	Total	3,446	0.121	416
Peterborough County and City Northwest	Low Density	4,193	0.071	296
	Medium Density	1,270	0.077	98
	High Density	1,738	0.016	27
	Total	7,201	0.059	422
Peterborough County Northeast	Low Density	1,319	0.059	78
	Medium Density	40	0.056	2
	High Density	685	0.012	8
	Total	2,045	0.043	89
		SUBTOTAL:		1,003
		LESS: Available Pupil Places:		347
		NET GROWTH-RELATED PUPILS:		656

Peterborough Victoria Northumberland and Clarington Catholic District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form E - Growth-Related Pupils - Secondary Panel

Secondary Planning Area	Dwelling Unit Type	Net New Units	Secondary Pupil Yield	Secondary Growth-Related Pupils
South Peterborough	Low Density	2,962	0.031	91
	Medium Density	421	0.032	14
	High Density	500	0.010	5
	Total	3,884	0.028	109
North Peterborough	Low Density	6,064	0.034	206
	Medium Density	1,394	0.038	54
	High Density	2,424	0.011	27
	Total	9,882	0.029	286
		SUBTOTAL:		396
		LESS: Available Pupil Places:		154
		NET GROWTH-RELATED PUPILS:		242

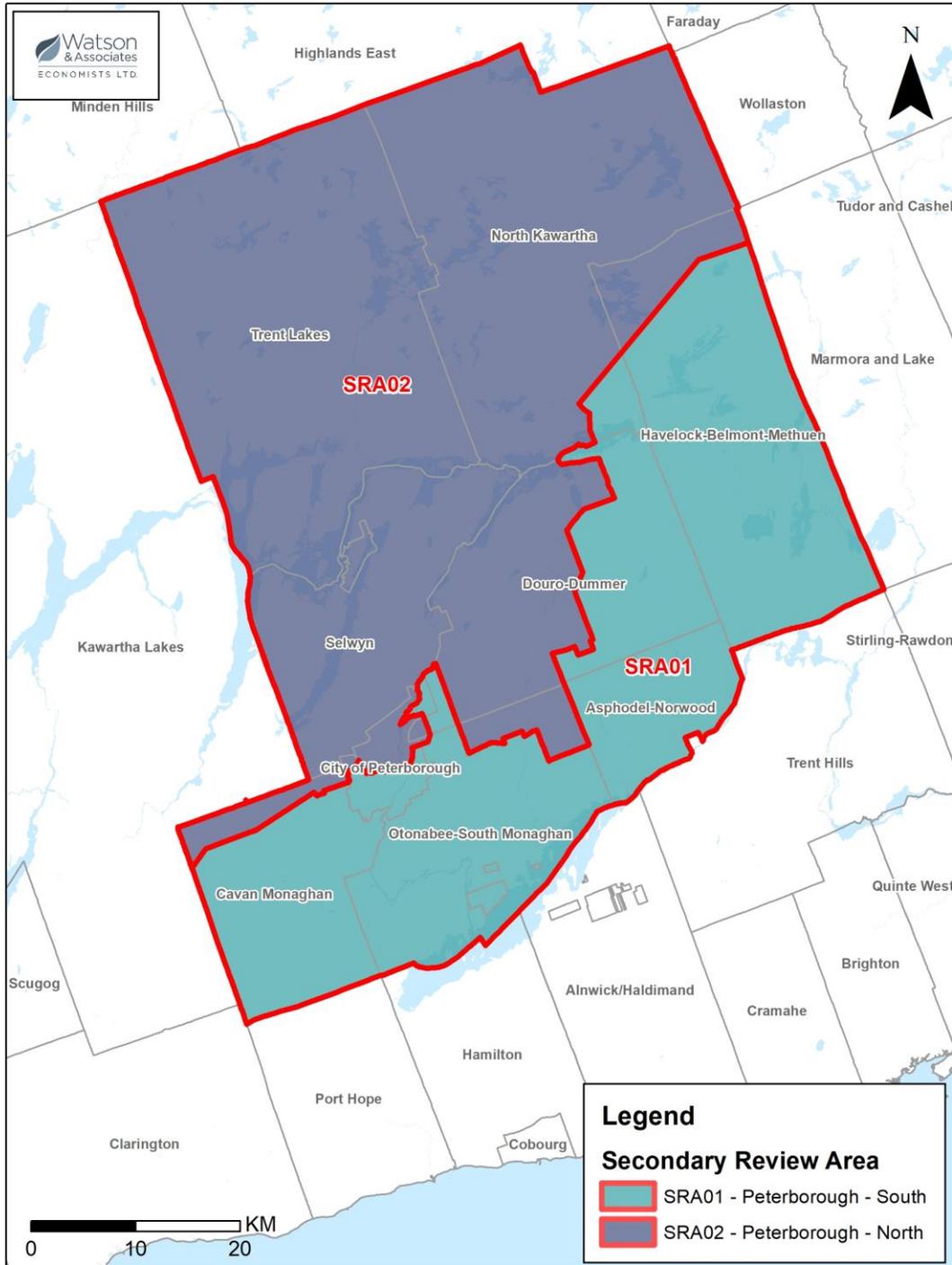


Peterborough Victoria Northumberland and Clarington Catholic District School Board Elementary EDC Review Areas 2021





Peterborough Victoria Northumberland and Clarington Catholic District School Board Secondary EDC Review Areas 2021



Peterborough Victoria Northumberland and Clarington Catholic District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form G - Growth-Related Net Education Land Costs

ELEMENTARY PANEL

Review Area	Site Status (Optioned, Purchased, Reserved, Etc.)	Proposed Year Of Acquisition	Site Location/ Facility Type	Net Growth-Related Pupil Place Requirements	Proposed School Capacity	Percent of Capacity Attributed to Net Growth-Related Pupil Place Requirements	Total Number of Acres Required (Footnote Oversized Sites)	Acreage To Be Funded in EDC By-Law Period	Cost Per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Financing Costs	Total Education Land Costs
ERA02	TBD	2024	New School Or Addition	368	450	81.84%	5.00	4.09	\$ 675,000	\$ 2,762,260	\$ 379,552	-\$ 0	\$ 95,409	\$ 3,237,221
ERA03	TBD	2029	New School Or Addition	199	400	49.80%	4.00	1.99	\$ 675,000	\$ 1,344,474	\$ 215,010	-\$ 0	\$ 47,358	\$ 1,606,842
ERA04			Accommodated In Existing Facilities Or Additions	89						\$ -	\$ -	\$ -		
										\$ -	\$ -	\$ -		
Total:				656	850		9.0	6.1		\$ 4,106,734	\$ 594,562	-\$ 0	\$ 142,767	\$ 4,844,063

SECONDARY PANEL

Review Area	Site Status (Optioned, Purchased, Reserved, Etc.)	Proposed Year Of Acquisition	Facility Type	Net Growth-Related Pupil Place Requirements	Proposed School Capacity	Percent of Capacity Attributed to Net Growth-Related Pupil Place Requirements	Total Number of Acres Required (Footnote Oversized Sites)	Acreage To Be Funded in EDC By-Law Period	Cost Per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Financing Costs	Total Education Land Costs
SRA02	TBD	2030	New School Or Addition	242	800	30.25%	12.00	3.63	\$ 675,000	\$ 2,450,007	\$ 403,881	-\$ 0	\$ 86,665	\$ 2,940,553
Total:				242	800		12.00	3.63		\$ 2,450,007	\$ 403,881	-\$ 0	\$ 86,665	\$ 2,940,553

**Peterborough Victoria Northumberland and Clarington Catholic District School Board
Education Development Charges Submission 2021: City and County of Peterborough
Form H1 - EDC Calculation - Uniform Residential**

Determination of Total Growth-Related Net Education Land Costs

Total:	Education Land Costs (Form G)	\$	7,784,616
Add:	EDC Financial Obligations (Form A2)	\$	-
Subtotal:	Net Education Land Costs	\$	7,784,616
Add:	EDC Study Costs	\$	225,000
Total:	Growth-Related Net Education Land Costs	\$	8,009,616

Apportionment of Total Growth-Related Net Education Land Costs

Total Growth-Related Net Education Land Costs to be Attributed to Non-Residential Development (Maximum 40%)	10%	\$	800,962
Total Growth-Related Net Education Land Costs to be Attributed to Residential Development	90%	\$	7,208,655

Calculation of Uniform Residential Charge

Residential Growth-Related Net Education Land Costs	\$	7,208,655
Net New Dwelling Units (Form C)		13,765
Uniform Residential EDC per Dwelling Unit	\$	524

Calculation of Non-Residential Charge - Board Determined GFA

Non-Residential Growth-Related Net Education Land Costs	\$	800,962
GFA Method:	Non-Exempt Board-Determined GFA (Form D)	5,723,297
	Non-Residential EDC per Square Foot of GFA	\$ 0.14

**Peterborough Victoria Northumberland and Clarington Catholic District School Board
Education Development Charges Submission 2021: City and County of Peterborough
Form H2 - EDC Calculation - Differentiated Residential (Part 1 of 2)**

Determination of Total Growth-Related Net Education Land Costs

Total:	Education Land Costs (Form G)	\$ 7,784,616
Add:	EDC Financial Obligations (Form A2)	\$ -
Subtotal:	Net Education Land Costs	\$ 7,784,616
Less:	Operating Budget Savings	
	Positive EDC Reserve Fund Balance	
Subtotal:	Growth-Related Net Education Land Costs	\$ 7,784,616
Add:	EDC Study Costs	\$ 225,000.00
Total:	Growth-Related Net Education Land Costs	\$ 8,009,616

Apportionment of Total Growth-Related Net Education Land Costs

Total Growth-Related Net Education Land Costs to be Attributed to Non-Residential Development (Maximum 40%)	10%	\$ 800,962
Total Growth-Related Net Education Land Costs to be Attributed to Residential Development	90%	\$ 7,208,655

Peterborough Victoria Northumberland and Clarington Catholic District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form H2 - EDC Calculation - Differentiated Residential (Part 2 of 2)

Residential Growth-Related Net Education Land Costs:	\$ 7,208,655
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Determination of Distribution of New Development:

Type of Development (Form B)	Net New Units (Form B & C)	15-Year Elementary Pupil Yield (Form E)	Elementary Gross Requirements of New Development	Distribution of Elementary Gross Requirements of New Development	15-Year Secondary Pupil Yield (Form E)	Secondary Gross Requirements of New Development	Distribution of Secondary Gross Requirements of New Development	Total Gross Requirements of New Development	Distribution Factor
Low Density	9,026	0.090	809	80.7%	0.033	297	75%	1,106	79%
Medium Density	1,816	0.081	147	14.7%	0.037	67	17%	215	15%
High Density	2,924	0.016	46	4.6%	0.011	32	8%	78	6%
Total	13,765	0.073	1,003	100%	0.029	396	100%	1,399	100%

Calculation of Differentiated Charge:

Type of Development (Form B)	Apportionment of Residential Net Education Land Cost By Development Type	Net New Units (Carried over from above)	Differentiated Residential EDC per Unit by Development Type
Low Density	\$ 5,700,561	9,026	\$ 632
Medium Density	\$ 1,106,264	1,816	\$ 609
High Density	\$ 401,830	2,924	\$ 137



Kawartha Pine Ridge District School Board
Education Development Charge Forms Submission
County of Peterborough and City of Peterborough

Kawartha Pine Ridge District School Board
Education Development Charges Submission 2021: City and County of Peterborough
Form A - Eligibility to Impose an EDC

A.1.1: CAPACITY TRIGGER CALCULATION - ELEMENTARY PANEL

Elementary Panel Board-Wide EDC Capacity	Projected Elementary Panel Enrolment						Elementary Average Projected Enrolment Less Capacity
	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Average Projected Enrolment Over Five Years	
25,195.0	25,000	25,485	26,024	26,484	26,993	25,997	802

A.1.2: CAPACITY TRIGGER CALCULATION - SECONDARY PANEL

Secondary Panel Board-Wide EDC Capacity	Projected Secondary Panel Enrolment						Secondary Projected Enrolment Less Capacity
	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Average Projected Enrolment Over Five Years	
12,444.0	10,013	10,361	10,571	10,715	10,841	10,500	-1,944

**Kawartha Pine Ridge District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form B - Dwelling Unit Summary**

PROJECTION OF GROSS NEW DWELLING UNITS BY ELEMENTARY EDC REVIEW AREA

	Year 1 2021/ 2022	Year 2 2022/ 2023	Year 3 2023/ 2024	Year 4 2024/ 2025	Year 5 2025/ 2026	Year 6 2026/ 2027	Year 7 2027/ 2028	Year 8 2028/ 2029	Year 9 2029/ 2030	Year 10 2030/ 2031	Year 11 2031/ 2032	Year 12 2032/ 2033	Year 13 2033/ 2034	Year 14 2034/ 2035	Year 15 2035/ 2036	Total All Units
Peterborough County and City - Southwest																
Low Density	374	375	379	382	475	477	476	481	486	360	344	346	346	347	347	5,997
Medium Density	109	114	115	117	126	128	131	133	135	95	96	97	97	98	98	1,687
High Density	97	98	98	99	132	133	138	139	140	131	147	148	149	150	150	1,950
Total	580	587	592	598	733	737	745	753	761	585	588	591	593	595	595	9,634
Peterborough County and City - Northeast																
Low Density	226	227	228	232	134	128	128	127	127	258	234	245	245	245	245	3,029
Medium Density	12	12	12	12	4	3	3	3	3	44	45	46	46	46	46	338
High Density	67	67	67	68	47	47	47	47	47	58	82	82	82	82	82	974
Total	305	306	308	312	185	178	178	177	177	361	362	372	373	374	374	4,341
Total Jurisdiction																
Low Density	601	602	607	614	609	605	604	608	613	618	579	590	591	592	592	9,026
Medium Density	120	126	127	129	130	131	134	136	138	139	141	142	143	144	144	2,025
High Density	164	165	166	167	179	179	185	186	187	189	230	231	232	233	233	2,924
Total	885	893	900	910	918	915	923	930	938	946	949	963	966	969	969	13,975

Kawartha Pine Ridge District School Board

Education Development Charges Submission 2021: City and County of Peterborough

Form C - Net New Dwelling Units - By-Law Summary

Elementary Planning Review Areas	Number of Units
Peterborough County and City - Southwest	9,634
Peterborough County and City - Northeast	4,341

Grand Total Gross New Units In By-Law Area	13,975
Less: Statutorily Exempt Units In By-Law Area	210
Total Net New Units In By-Law Area	13,765

Kawartha Pine Ridge District School Board

Education Development Charges Submission 2021: City and County of Peterborough

Form D - Non-Residential Development

D1 - Non-Residential Charge Based On Gross Floor Area (sq. ft.)

Total Estimated Non-Residential Board-Determined Gross Floor Area to be Constructed Over 15 Years From Date of By-Law Passage:	8,306,145
Less: Board-Determined Gross Floor Area From Exempt Development:	2,582,849
Net Estimated Board-Determined Gross Floor Area:	5,723,297

Kawartha Pine Ridge District School Board

Education Development Charges Submission 2021: City and County of Peterborough

Form E - Growth-Related Pupils - Elementary Panel

Elementary Planning Area	Dwelling Unit Type	Net New Units	Elementary Pupil Yield	Elementary Growth-Related Pupils
Peterborough County and City - Southwest	Low Density	5,997	0.208	1,245
	Medium Density	1,513	0.105	159
	High Density	1,950	0.040	77
	Total	9,460	0.157	1,481
Peterborough County and City - Northeast	Low Density	3,029	0.191	580
	Medium Density	303	0.081	24
	High Density	974	0.037	36
	Total	4,306	0.149	640
		SUBTOTAL:		2,122
		LESS: Available Pupil Places:		628
		NET GROWTH-RELATED PUPILS:		1,493

Kawartha Pine Ridge District School Board

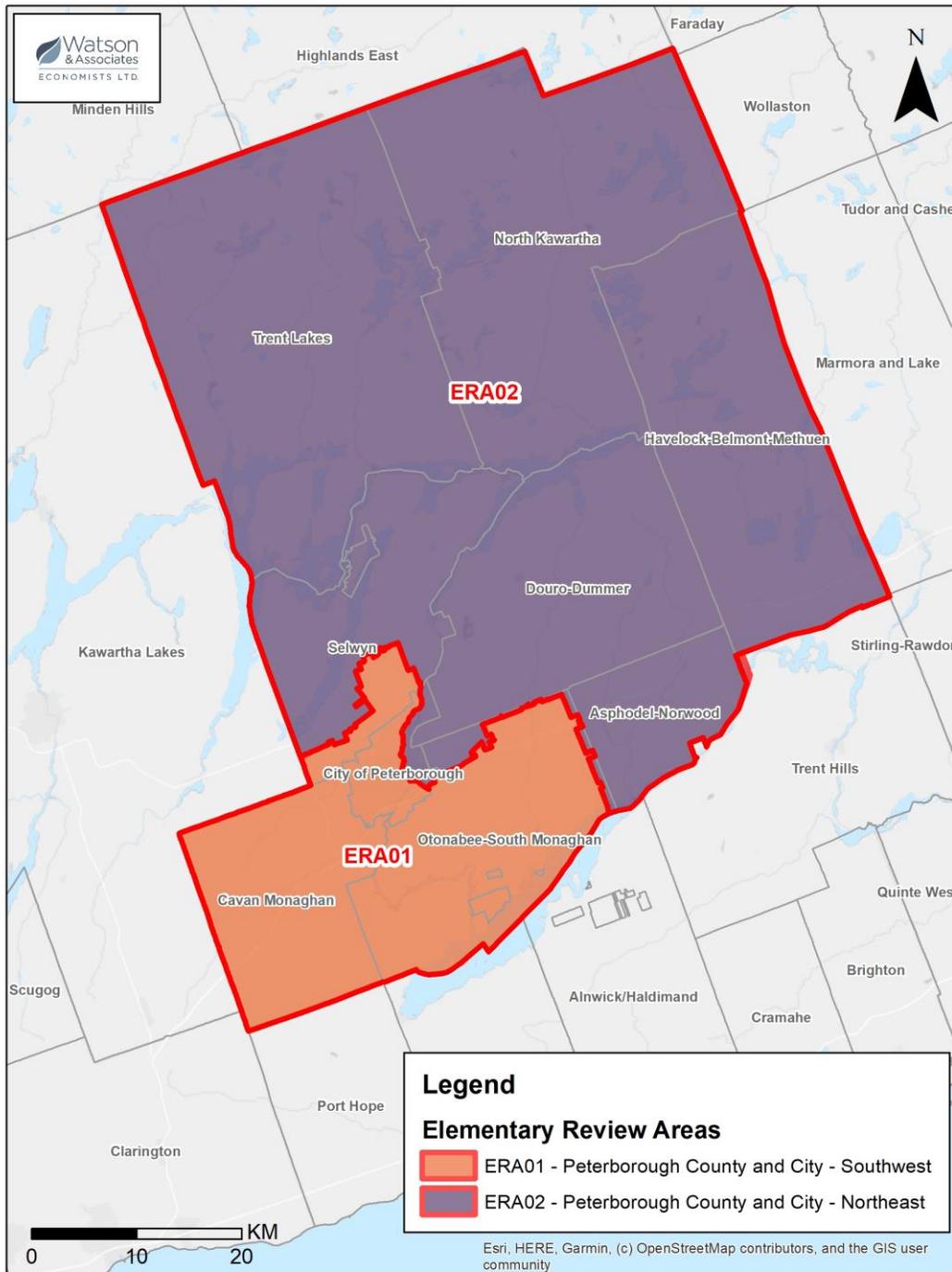
Education Development Charges Submission 2021: City and County of Peterborough

Form E - Growth-Related Pupils - Secondary Panel

Secondary Planning Area	Dwelling Unit Type	Net New Units	Secondary Pupil Yield	Secondary Growth-Related Pupils
Peterborough County and City	Low Density	9,026	0.079	715
	Medium Density	1,816	0.078	142
	High Density	2,924	0.023	67
	Total	13,765	0.067	925
		SUBTOTAL:		925
		LESS: Available Pupil Places:		65
		NET GROWTH-RELATED PUPILS:		860

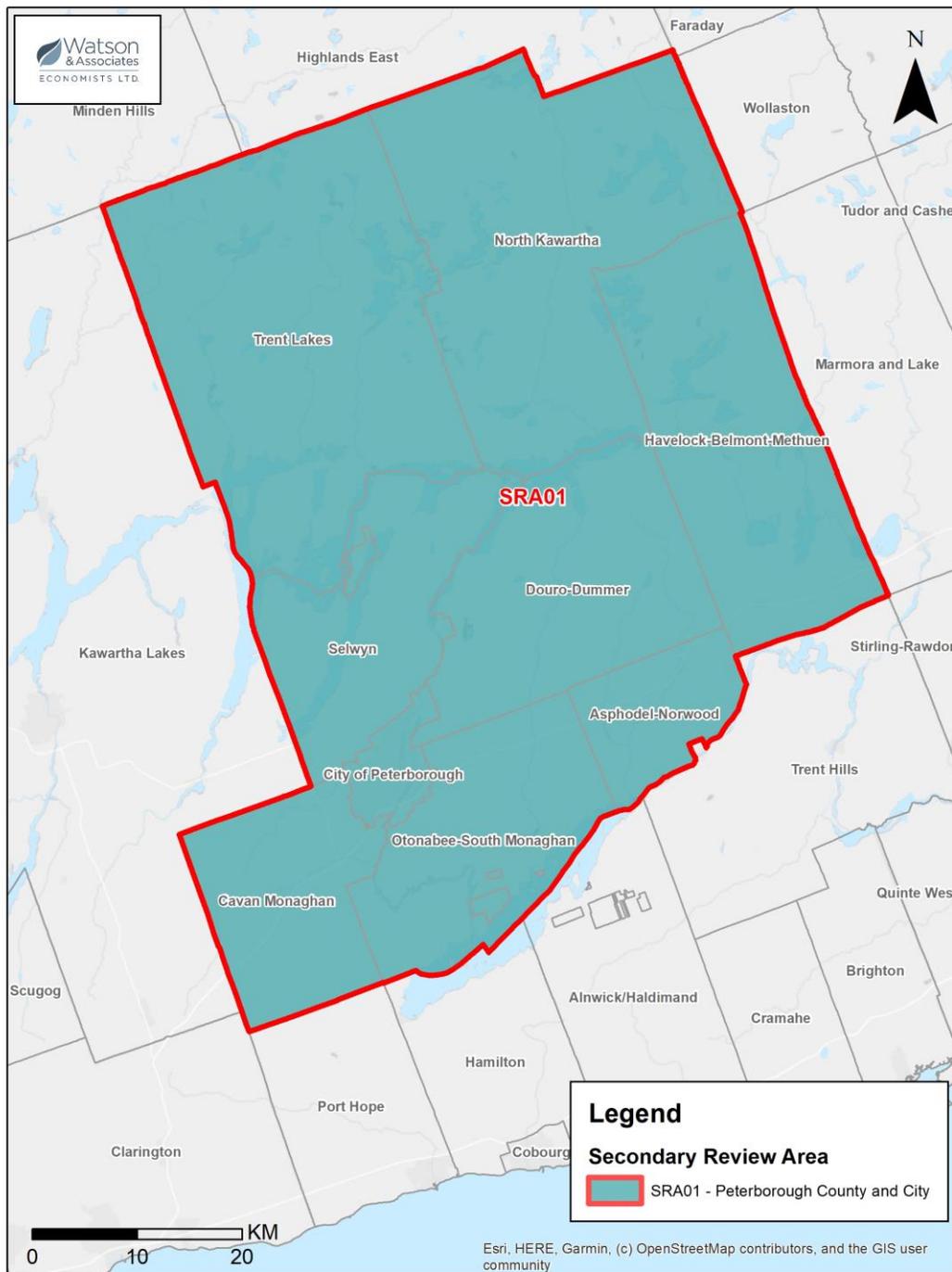


Kawartha Pine Ridge District School Board Elementary EDC Review Areas 2021





Kawartha Pine Ridge District School Board Secondary EDC Review Areas 2021



Kawartha Pine Ridge District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form G - Growth-Related Net Education Land Costs

ELEMENTARY PANEL

Review Area	Site Status (Optioned, Purchased, Reserved, Etc.)	Proposed Year Of Acquisition	Site Location/ Facility Type	Net Growth-Related Pupil Place Requirements	Proposed School Capacity	Percent of Capacity Attributed to Net Growth-Related Pupil Place Requirements	Total Number of Acres Required (Footnote Oversized Sites)	Acreage To Be Funded in EDC By-Law Period	Cost Per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Financing Costs	Total Education Land Costs
ERA01 Southwest	Owned	2021	New School (Glenforest Site)	501	501	100.00%	7	7.0		\$ -	\$ 575,029	\$ -	\$ 39,847	\$ 614,876
ERA01 Southwest	TBD	2025	New School	352	401	87.77%	5	4.4	\$ 700,000	\$ 3,071,961	\$ 407,032	\$ 0	\$ 241,077	\$ 3,720,070
ERA02 Northeast	TBD	2024	New School	501	501	100.00%	6	6.0	\$ 675,000	\$ 4,050,000	\$ 539,862	\$ -	\$ 318,055	\$ 4,907,917
ERA02 Northeast			Accommodated In Existing Facilities Or Additions	139						\$ -	\$ -	\$ -	\$ -	\$ -
Total:				1,493	1,403		18.0	17.4		\$ 7,121,961	\$ 1,521,923	\$ 0	\$ 598,979	\$ 9,242,863

SECONDARY PANEL

Review Area	Site Status (Optioned, Purchased, Reserved, Etc.)	Proposed Year Of Acquisition	Facility Type	Net Growth-Related Pupil Place Requirements	Proposed School Capacity	Percent of Capacity Attributed to Net Growth-Related Pupil Place Requirements	Total Number of Acres Required (Footnote Oversized Sites)	Acreage To Be Funded in EDC By-Law Period	Cost Per Acre	Education Land Costs	Eligible Site Preparation Costs	Land Escalation Costs	Financing Costs	Total Education Land Costs
Peterborough County and City	TBD	2028	New School	860	900	95.55%	12.00	11.5	\$ 675,000	\$ 7,739,317	\$ 1,164,794	\$ 0	\$ 617,011	\$ 9,521,122
Total:				860	900		12.00	11.47		\$ 7,739,317	\$ 1,164,794	\$ 0	\$ 617,011	\$ 9,521,122

**Kawartha Pine Ridge District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form H1 - EDC Calculation - Uniform Residential**

Determination of Total Growth-Related Net Education Land Costs

Total:	Education Land Costs (Form G)	\$	18,763,985
Add:	EDC Financial Obligations (Form A2)	\$	-
Subtotal:	Net Education Land Costs	\$	18,763,985
Add:	EDC Study Costs	\$	300,000
Total:	Growth-Related Net Education Land Costs	\$	19,063,985

Apportionment of Total Growth-Related Net Education Land Costs

Total Growth-Related Net Education Land Costs to be Attributed to Non-Residential Development (Maximum 40%)	10%	\$	1,906,399
Total Growth-Related Net Education Land Costs to be Attributed to Residential Development	90%	\$	17,157,587

Calculation of Uniform Residential Charge

Residential Growth-Related Net Education Land Costs	\$	17,157,587
Net New Dwelling Units (Form C)		13,765
Uniform Residential EDC per Dwelling Unit	\$	1,246

Calculation of Non-Residential Charge - Board Determined GFA

Non-Residential Growth-Related Net Education Land Costs	\$	1,906,399
GFA Method:	Non-Exempt Board-Determined GFA (Form D)	5,723,297
	Non-Residential EDC per Square Foot of GFA	\$ 0.33

**Kawartha Pine Ridge District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form H2 - EDC Calculation - Differentiated Residential (Part 1 of 2)**

Determination of Total Growth-Related Net Education Land Costs

Total:	Education Land Costs (Form G)	\$	18,763,985
Add:	EDC Financial Obligations (Form A2)	\$	-
Subtotal:	Net Education Land Costs	\$	18,763,985
Less:	Operating Budget Savings		
	Positive EDC Reserve Fund Balance		
Subtotal:	Growth-Related Net Education Land Costs	\$	18,763,985
Add:	EDC Study Costs	\$	300,000.00
Total:	Growth-Related Net Education Land Costs	\$	19,063,985

Apportionment of Total Growth-Related Net Education Land Costs

Total Growth-Related Net Education Land Costs to be Attributed to Non-Residential Development (Maximum 40%)	10%	\$	1,906,399
Total Growth-Related Net Education Land Costs to be Attributed to Residential Development	90%	\$	17,157,587

Kawartha Pine Ridge District School Board
 Education Development Charges Submission 2021: City and County of Peterborough
 Form H2 - EDC Calculation - Differentiated Residential (Part 2 of 2)

Residential Growth-Related Net Education Land Costs:	\$ 17,157,587
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Determination of Distribution of New Development:

Type of Development (Form B)	Net New Units (Form B & C)	15-Year Elementary Pupil Yield (Form E)	Elementary Gross Requirements of New Development	Distribution of Elementary Gross Requirements of New Development	15-Year Secondary Pupil Yield (Form E)	Secondary Gross Requirements of New Development	Distribution of Secondary Gross Requirements of New Development	Total Gross Requirements of New Development	Distribution Factor
Low Density	9,026	0.202	1,825	86.0%	0.079	715	77%	2,540	83%
Medium Density	1,816	0.101	183	8.6%	0.078	142	15%	326	11%
High Density	2,924	0.039	113	5.3%	0.023	67	7%	180	6%
Total	13,765	0.154	2,122	100%	0.067	925	100%	3,046	100%

Calculation of Differentiated Charge:

Type of Development (Form B)	Apportionment of Residential Net Education Land Cost By Development Type	Net New Units (Carried over from above)	Differentiated Residential EDC per Unit by Development Type
Low Density	\$ 14,306,282	9,026	\$ 1,585
Medium Density	\$ 1,835,179	1,816	\$ 1,011
High Density	\$ 1,016,125	2,924	\$ 348