



THIS MEETING WILL BE WEBCAST ON THE [CITY'S PUBLIC YOUTUBE SITE](#) (CITYWATERLOO) AND MAY BE TELECAST ON PUBLIC TELEVISION



## **COUNCIL MEETING AGENDA**

Monday, December 1, 2025

Closed Meeting: 2:00 PM

Public Meeting: 4:00 PM

Councillor Roe in the Chair

1. **DISCLOSURE OF PECUNIARY INTEREST AND THE GENERAL NATURE THEREOF**
2. **CLOSED MEETING**

### **Recommendation:**

That Council hold a closed meeting for the purposes of considering the following subject matter:

- a) proposed or pending acquisition or disposition of land by the municipality or local board (potential acquisition/disposition of city-owned lands); and,
- b) advice that is subject to solicitor-client privilege, including communications necessary for that purpose (potential acquisition/disposition of city-owned lands).

## **COUNCIL MEETING WILL RECESS AND RECONVENE AT 4:00 PM**

3. **TERRITORIAL ACKNOWLEDGEMENT**
4. **MOMENT OF REFLECTION**

**5. DISCLOSURE OF PECUNIARY INTEREST AND THE GENERAL NATURE THEREOF**

**6. APPROVAL OF MINUTES**

That the previous meeting minutes be approved.

**a) November 3, 2025 – Council Meeting Page 7**

**Recommendation:**

That the minutes of the Council meeting held on November 3, 2025 be approved as printed.

**7. CONSENT MOTION**

That consent motion items (a) through (b) be approved.

**a) Title: Page 13  
Annual Health and Safety Policies and  
2024 Annual Health and Safety Report  
Summary**

Report No.: CORP2025-037

Prepared By: Kathy Weidhaas

**Recommendation:**

1. That Council receive the 2024 Annual Health and Safety Report Summary for information.

**b) Title: Page 19  
404 K-W Wing (Royal Canadian Air Force  
Association) Lease Agreement**

Report No.: COM2025-032

Prepared By: Liz Badley

**Recommendation:**

1. That Council approve report COM2025-032.
2. That Council approve the lease agreement for 404 K-W Wing (Royal Canadian Air Force Association) for a portion of the building at 510 Dutton Dr, Waterloo, according to the Terms and Conditions as outlined in this report.
3. That the Mayor and Clerk be authorized to sign the Lease Agreement and any other necessary documents, subject to the satisfaction of the City Solicitor.

**8. ITEMS REMOVED FROM THE CONSENT MOTION**

**9. STAFF REPORTS**

- a)     **Title:**                **Amended Purchasing By-Law**                               **Page 21**  
Report No.:   CORP2025-033  
Prepared By:   Jason Wilhelm

**Presentation:** Jason Wilhelm

**Recommendation:**

1.     That report CORP2025-033 be approved by Council;
2.     That By-Law No. 2019-026 (Amended by By-Law No. 2025-09, May 26, 2025) be repealed; and
3.     That Council approves the By-law to establish policies for the procurement of Goods and Services by the City, attached as Appendix A.

- b)     **Title:**                **Federation of Canadian Municipalities**                               **Page 104**  
              **Community Buildings Retrofit Capital**  
              **Project Grant**  
Report No.:   COM2025-031  
Prepared By:   Scott Prevost, Gracjan Oleksinki

**Introductory Remarks:**   Scott Prevost

**Recommendation:**

1.     That Council approve report COM2025-031.
2.     That Council approve the City of Waterloo's application to the Federation of Canadian Municipalities Community Buildings Retrofit Capital Project grant program for the infrastructure project RIM Park Energy and Accessibility Retrofit with a project value of \$10,000,000.
3.     That if the City of Waterloo's RIM Park Energy and Accessibility grant application is approved, Council approves the release of 2026 non-routine capital funding for the City portion in the amount of \$2,000,000 funded from ref #225 and a \$6,000,000 loan portion funded from ref #225 to be repaid over a 10-year term.

4. That Council authorize the Mayor and Clerk to sign the grant transfer agreement and any other related documents, subject to the satisfaction of the City Solicitor.

## **COUNCIL MEETING WILL RECESS AND RECONVENE AT 6:30 PM**

### **10. DISCLOSURE OF PECUNIARY INTEREST AND THE GENERAL NATURE THEREOF**

### **11. STAFF REPORTS continued**

- a)     **Title:**                   **Get READI Benchmarking and  
Implementation Plan** **Page 113**

Report No.: CAO2025-022

Prepared By: Divya Handa and Adam Nerger

**Presentation:** Divya Handa

**Recommendation:**

1. That Council accepts report CAO2025-022 for informational purposes.

- b)     **Title:**                   **Urban Design Manual 2.0 Project Launch**

Report No.: IPPW2025-070

Prepared By: Max Kerrigan

**Presentation:** Max Kerrigan and  
Catherine Jay (SGL Planning & Design Inc.)

**REPORT TO FOLLOW**

### **12. PUBLIC MEETINGS**

#### **Informal Public Meeting**

- a)     **Title:**                   **Zoning By-law Amendment Z-25-25** **Page 164**  
**Anndale Holdings Inc.**  
**445 Anndale Road**

Prepared by: Madison Headrick and John Vos

Ward No.: Ward 4 (Northeast)

**Presentation:** Madison Headrick

**Delegation:**

1. David Galbraith, UP Consulting

**Formal Public Meeting**

**b) Title:** **Uptown Community Improvement Plan – CIP Update** **Page 165**

Report No.: CAO2025-026

Prepared By: Dominique Charbonneau

Ward No.: Ward 7

**Presentation:** Dominique Charbonneau

**Delegations:**

1. Paula Saunders, Built Environment Subcommittee Chair, Grand River Accessibility Advisory Committee

**Recommendation:**

1. That Council approve report CAO2025-026.
2. That Council approve the Uptown Community Improvement Plan Manual included as attachment 1 to report CAO2025-026
3. That Council approve and pass the attached Uptown CIP Designation By-law and Uptown CIP Adoption By-law.

**13. CONSIDERATION OF NOTICE OF MOTION GIVEN AT PREVIOUS MEETING**

None

**14. NOTICE OF MOTION**

None

**15. COMMUNICATIONS AND CORRESPONDENCE**

None

**16. UNFINISHED BUSINESS**

None

## **17. QUESTIONS**

## **18. NEW BUSINESS**

### **a) Regional All-Council Meeting**

#### **Recommendation:**

That Council approve participation in a joint meeting with the Councils of the Regional Municipality of Waterloo and all Area Municipalities within the Region of Waterloo on Friday, December 19, 2025 at 2:00 p.m. at the Township of Woolwich Council Chambers, 24 Church Street West, Elmira, in accordance with Section 236 (2) of the Municipal Act, 2001 for the consideration of matters of common interest.

## **19. ENACTMENT OF BY-LAWS**

#### **Recommendation:**

That the By-laws listed below be read a first, second and third time and finally passed, numbered sequentially commencing with By-law Number 2025-083 and that the Mayor and Clerk be authorized to sign them accordingly.

- a) By-law to Establish Policies for the Procurement of Goods and Services by the City (CORP2025-033, Council December 1, 2025)
- b) By-law to Designate a Community Improvement Project Area for the City of Waterloo (CAO2025-026, Council December 1, 2025)
- c) By-law to Adopt an Updated Community Improvement Plan for the City of Waterloo (CAO2025-026, Council December 1, 2025)
- d) By-law to confirm all actions and proceedings of Council, December 1, 2025

## **20. ADJOURNMENT**



A meeting of the Council of The Corporation of the City of Waterloo was held on November 3, 2025 at 3:30 p.m. in the Council Chambers, 100 Regina Street South, Waterloo, Ontario and streamed live via YouTube.



## **COUNCIL MEETING MINUTES – DRAFT**

Monday, November 3, 2025  
Closed Meeting: 2:01 PM  
Public Meeting: 3:30 PM

**PRESENT:** Mayor Dorothy McCabe, Councillor Sandra Hanmer, Councillor Royce Bodaly, Councillor Hans Roach, Councillor Diane Freeman, Councillor Jen Vasic, Councillor Mary Lou Roe, Councillor Julie Wright

Councillor Vasic in the Chair

### **1. DISCLOSURE OF PECUNIARY INTEREST AND THE GENERAL NATURE THEREOF**

No disclosure of pecuniary interest was declared by any member of Council at this point in the meeting.

### **2. CLOSED MEETING**

Moved by Councillor Roe, Seconded by Mayor McCabe:

That Council hold a closed meeting for the purposes of considering the following subject matter:

- a) proposed or pending acquisition or disposition of land by the municipality or local board (potential disposition of city-owned lands);
- b) labour relations or employee negotiations (potential disposition of city-owned lands);
- c) personal matters about an identifiable individual, including municipal or local board employees (potential disposition of city-owned lands).

**Carried Unanimously**

Council meeting recessed:  
Council meeting reconvened:

(Time: 2:01 p.m.)  
(Time: 3:43 p.m.)

**PRESENT:** Mayor Dorothy McCabe (Time: 3:52 p.m.), Councillor Sandra Hanmer, Councillor Royce Bodaly, Councillor Hans Roach, Councillor Diane Freeman, Councillor Jen Vasic, Councillor Mary Lou Roe, Councillor Julie Wright

### **3. TERRITORIAL ACKNOWLEDGEMENT**

Councillor Vasic opened the meeting with the following Territorial Acknowledgement:

We would like to begin by acknowledging that the land on which we gather (land on which we are broadcasting from) today is the land traditionally cared for by the Haudenosaunee, Anishinaabe and Chonnontan People. We also acknowledge the enduring presence and deep traditional knowledge and philosophies of the Indigenous People with whom we share this land today.

### **4. MOMENT OF REFLECTION**

Councillor Vasic provided Council with a moment of reflection.

At the beginning of this Council meeting, we pause to think about the needs of our community. May we show wisdom and compassion in all our decisions.

### **5. DISCLOSURE OF PECUNIARY INTEREST AND THE GENERAL NATURE THEREOF**

No disclosure of pecuniary interest was declared by any member of Council at this point in the meeting.

### **6. APPROVAL OF MINUTES**

That the previous meeting minutes be approved.

#### **a) October 6, 2025 – Council Meeting**

Moved by Councillor Wright, Seconded by Councillor Freeman:

That the minutes of the Council meeting held on October 6, 2025 be approved as amended by comments from Councillor Wright.

**Carried Unanimously**



## 7. PRESENTATIONS/DELEGATIONS

### a) Waterloo Region Immigration Partnership Council

Ian McLean, Council Member spoke about the work of the Immigration Partnership, including the initiatives they have undertaken over their 16-year history. Ian McLean also introduced their new investment strategy, which includes securing alternative funding sources. Ian McLean responded to questions of Council. Tara Bedard, Executive Director also responded to questions of Council.

Mayor McCabe joined the meeting.

(Time: 3:52 p.m.)

Moved by Councillor Freeman, Seconded by Councillor Roe:

That Council direct staff to report back to Council at a later date on the funding opportunities, to provide time for the area treasurers to collectively explore options for potential support.

**Carried Unanimously**

## 8. CONSENT MOTION

That consent motion item (a) be approved.

- a)     **Title:**                 **Special Service/Area Levy Vote  
Update – Upper Beechwood Homes  
Association Inc.**
- Report No.:     CORP2025-034
- Prepared By:    Natalia Chebel

Moved by Councillor Hanmer, Seconded by Councillor Freeman:

1.     That CORP2025-034 be approved.
2.     That Council approve the implementation of a Special Service/Area Levy (SSAL) for the properties listed in Schedule A. for the levy year beginning in 2027.
3.     That Council authorize the Mayor and City Clerk to sign a Licence and Operating Agreement and Lease Agreement with the Upper Beechwood Homes Association Inc. and any other related agreements, subject to the approval of the City Solicitor.

**Carried Unanimously**

## **9. ITEMS REMOVED FROM THE CONSENT MOTION**

None

Council meeting recessed: (Time: 4:29 p.m.)  
Council meeting reconvened: (Time: 6:31 p.m.)

**PRESENT:** Mayor Dorothy McCabe, Councillor Sandra Hanmer, Councillor Royce Bodaly, Councillor Hans Roach, Councillor Diane Freeman, Councillor Jen Vasic, Councillor Mary Lou Roe, Councillor Julie Wright

## **10. DISCLOSURE OF PECUNIARY INTEREST AND THE GENERAL NATURE THEREOF**

No disclosure of pecuniary interest was declared by any member of Council at this point in the meeting.

## **11. PRESENTATIONS/DELEGATIONS**

### **a) Waterloo Economic Development Advisory Committee**

Mark Baboolal, Committee Chair gave a presentation on who they are and what they do, what the committee has done over 2025, and the next steps for the committee.

### **b) Age-Friendly Waterloo Advisory Committee**

Jenny Flagler-George, Committee Chair gave a presentation on what the committee has contributed to the City over the last year and the Age-friendly action plan, as well as celebrating Senior of the Year and the connections they've made with the community. Jenny Flagler-George also responded to questions of Council.

### **c) Sustainability Advisory Committee**

Heather Leveille, Committee Chair and John Kokko, Vice-Chair gave a presentation outlining the committee background, what the committee has accomplished in 2025, an update on their subcommittees, and what the next year looks like.

### **d) Town and Gown Committee**

Chris Read, Committee Chair gave a presentation with background on the committee, what they've been working on, and their next steps. Chris Read responded to questions of Council.

**e) Municipal Heritage Committee**

Philippe Elsworthy, Committee Chair spoke about the challenges the committee faces and the work ahead for the next year. Ron Ormson, Commissioner, IPPW responded to questions of Council. Philippe Elsworthy also responded to questions of Council.

**f) Creative Sector Advisory Committee**

Kim Hong Nguyen, Vice-Chair and Rebecca Short, Member gave a presentation with background on the committee, the support for the City's strategic plan, and their key initiatives for 2025.

**12. STAFF REPORTS**

- a) Title: 2025 Highlights from GRAAC**  
Report No.: CTTEE2025-004  
Prepared By: Alyssa Clelland

Alyssa Clelland, Committee Co-Chair and Tamara Cooper, Committee Co-Chair gave a presentation with a committee overview, information on the importance of sidewalk snow clearing, highlights from the past year, and what's next for the committee. Tamara Cooper and Alyssa Clelland responded to questions of Council.

Moved by Councillor Hanmer, Seconded by Councillor Roe:

1. That Council receives this report as information.

**Carried Unanimously**

- b) Title: 2025 Committee Night Annual Report**  
Report No.: CORP2025-038  
Prepared By: Natalia Chebel and Samantha Belletti

Moved by Councillor Bodaly, Seconded by Councillor Freeman:

1. That CORP2025-038 be received as information.

**Carried Unanimously**

**13. NEW BUSINESS**

Councillor Roach mentioned that this coming weekend, on November 8<sup>th</sup>, FoxNet is holding a fundraiser for KidsAbility. FoxNet has done a great job with their fundraisers having raised over \$200,000.

Mayor McCabe mentioned that the Region of Waterloo launched their anti-hate and anti-discrimination campaign, We All Belong Here. Residents can visit the website, [webelongwr.ca](http://webelongwr.ca) for support and information on combatting hate in the community, as well as to report hate incidents.

#### **14. ENACTMENT OF BY-LAWS**

Moved by Councillor Roe, Seconded by Mayor McCabe:

That the By-laws listed below be read a first, second and third time and finally passed, numbered sequentially commencing with By-law Number 2025-070 and that the Mayor and Clerk be authorized to sign them accordingly.

- a) By-law 2025-070 By-law to confirm all actions and proceedings of Council, November 3, 2025

**Carried Unanimously**

#### **15. ADJOURNMENT**

Moved by Councillor Wright, Seconded by Councillor Freeman:

That the meeting adjourn.

(Time: 8:02 p.m.)

**Carried Unanimously**

**READ AND APPROVED, December 1, 2025**

---

Mayor

---

City Clerk



**STAFF REPORT**  
**Human Resources**

Title: Annual Health and Safety Policies and 2024 Annual Health and Safety Report Summary

Report Number: CORP2025-037

Author: Kathy Weidhaas

Council Date: December 1, 2025

File: N/A

Attachments: [Link to: H-010 Health and Safety Policy Statement](#)  
[Link to: H-002 Respectful Workplace Policy and Program](#)  
[Link to: H-003 Workplace Violence Policy and Program](#)

Ward No.: All

**Recommendations:**

That Council receive the 2024 Annual Health and Safety Report Summary for information.

**A. Executive Summary**

The Human Resources division conducts an annual review of workplace incidents and costs in order to assess the performance of the health, safety and wellness program. In 2024, as in previous years, the City of Waterloo experienced a low number of workplace incidents, seventy-four (74) in total, which is lower than the total experienced in 2023. Furthermore, the majority of these incidents were not severe in nature.

Workplace Safety and Insurance Board (WSIB) costs has increased over last year despite the decrease in total incidents which is an indicator of the complexity of the claims that incurred in 2024, and new legislation related to WSIB presumptive occupational illnesses, which resulted in more lost time days and associated costs and an increase in health care costs and physician/administrative fees.

Overall, the 2024 results indicate that the City continues to maintain an effective safety program, with processes in place to mitigate the risk of injury and illness; as well as manage associated costs. As such, the City continues meet legislative responsibilities and provides support to staff that have experience a workplace incident, injury or illness.

**B. Financial Implications**

Costs associated with workplace injuries are absorbed within the existing budget with the exception of presumptive WSIB costs, which are covered by the Sick Leave Reserve (SLR) in accordance with policy FC-006 - staff will monitor future trends. The 2024 ending SLR balance was \$4.2 million.

**C. Technology Implications**

Not applicable

**D. Link to Strategic Plan**

(Strategic Priorities: Reconciliation, Equity, Accessibility, Diversity and Inclusion; Environmental Sustainability and Climate Action; Complete Community; Infrastructure and Transportation Systems; Innovation and Future-Ready)

(Guiding Principles: Equity and Inclusion; Sustainability; Integrity; Workplace Wellbeing; Community-centred; Operational Excellence)

The 2024 Annual Health and Safety Report Summary is aligned with the City's guiding principles of Workplace Wellbeing and Operational Excellence.

**E. Previous Reports on this Topic**

CORP2024-029 Annual Health and Safety Policies and 2024 Annual Health and Safety Report Summary

CORP2023-035 Annual Health and Safety Policies Review

CORP2022-044 Second Quarter Health and Safety Report



**Annual Health and Safety Policies and 2024 Annual Health and Safety Report  
Summary  
CORP2025-037**

Incident and Workplace Safety and Insurance Board (WSIB) cost data can be used as an indicator of health and safety performance. The following summary is a comparative review over the past Four (4) years which includes previously reported years, in order to show trends in terms of the type, severity and associated costs of workplace incidents.

**1. Comparative Summary Incident Statistics – 2021-2024**

Across all categories, the seventy-four (74) incidents occurred in 2024 which was a 16.8% decrease over 2023. The trend in incident type observed in 2023, continues with incidents involving contact with an object or others being the single highest reported category resulting in over forty-one percent (41%) of the total incidents in 2024, followed by over exertion, slip, trip and falls, exposure and motor vehicle accidents.

In 2024, first aid incidents accounted for fifty-eight percent (58%), twenty-seven percent (27%) were health care and, eleven percent (15%) were lost time. When compared to 2023, all three categories showed a reduction in numbers. As this data is an indicator of incident severity, it should be understood that the majority of incidents experienced were not severe in nature. The data also demonstrates effective accommodation strategies exist to reduce overall lost time. Further, the increased number of transition days in 2024 represents effective cost mitigation for lost time claims and demonstrates the City of Waterloo's ongoing commitment to meet legislative requirements to provide early, safe and suitable work for injured or ill workers.

Continued efforts to advance health, safety and wellness programming will support the effective management of incident rates year over year, and a healthy and safe workforce.

Figure 1: Comparative Summary Incident Statistics – 2021-2024

	2024	2023	2022*	2021*
First Aid (FA)	43	51	47	66
Health Care (HC) Claims	20	23	8	16
Lost Time (LT) Claims	11	15	11	16
<b>Total Incidents</b>	<b>74</b>	<b>89</b>	<b>66</b>	<b>98</b>
<b>Total WSIB Claims</b>	<b>31</b>	<b>38</b>	<b>19</b>	<b>32</b>
<b>Total Lost Time Days*</b>	<b>478</b>	<b>338</b>	<b>381</b>	<b>521</b>
<b>Total Transition Days*</b>	<b>913</b>	<b>610</b>	<b>529</b>	<b>367</b>

\* Previously reported in quarterly health and safety reports

Lost Time Days and Transition Days have been rounded

**First Aid** totals include first aid incidents only.

**Health care** totals include approved and pending WSIB health care claims.

**Lost time** totals include approved and pending WSIB lost time claims.

## 2. Summary Workplace Safety and Insurance Board (WSIB Claims Costs) – 2021-2023

The City of Waterloo is a Schedule 2 Employer under WSIB and is individually responsible for the full cost of the claims filed by workers in addition to an annual administration fee. Unlike Schedule 1 Employers, Schedule 2 Employers are responsible for costs incurred for the life of a claim even if the worker is no longer employed at the City.

In 2024 there was an increase in total WSIB claim costs when compared to the previous year, specifically, 2024 saw an increase of 24% based on increased costs in all categories despite having fewer lost time claims than the previous year. This can be attributed to increased health care and physician admin fees compared to 2023; and to amendments to legislation related to presumptive occupational illnesses.



Figure 2: Summary Workplace Safety and Insurance Board (WSIB) Claims Costs – 2021-2024

	Health Care \$	Lost Time \$	Physician/ Admin Fees \$	Total WSIB Claim Costs \$
<b>Total Costs 2024</b>	\$119,802.34	\$332,890	\$78,209	\$530,902
<b>Total Costs 2023</b>	91,793	267,404	68,756	427,953
<b>Total Costs 2022*</b>	130,627	252,333	76,300	459,260
<b>Total Costs 2021*</b>	149,637	332,052	120,294	601,983

\* Previously reported in quarterly health and safety reports

Costs have been rounded

### Incident Type Definitions

**First Aid incidents** occur when an employee sustains a work-related injury or illness, which requires first aid treatment only.

**Health Care incidents** occur when an employee sustains a work-related injury or illness, which requires external medical attention and/or modified duties beyond seven (7) days. Health Care incidents are reportable to the Workplace Safety and Insurance Board (WSIB).

**Lost Time incidents** occur when an employee sustains a work-related injury or illness, which requires absence from the workplace beyond the date of injury. Lost Time incidents are reportable to the WSIB. When an employee retires, the City no longer incurs lost time days but may incur WSIB lost time claims costs if the employee was previously locked into benefits until age sixty-five (65).

**Transition days** occur when an employee is able to return to work and requires accommodation as a result of their work-related injury or illness.

### WSIB Claim Costs Definitions

**Health Care costs** can include prescription medications, health care treatment, medical devices, and NEL (Non-Economic Loss) awards to compensate for a permanent impairment from a work-related injury or illness.

**Lost Time costs** include loss of earnings benefits for approved lost time where the inability to work is a result of the work-related injury/disease and transitional work is not available. If an employee is locked into Loss of Earnings benefits by WSIB until age 65 and discontinues their employment prior to age 65, the City is responsible for the lost

time costs but does not incur lost time days since the employee is no longer scheduled to work.

**WSIB claim costs** include all health care, lost time and physician/administrative costs associated with claims registered with WSIB by the City of Waterloo as an employer (including active employees and retirees). As a Schedule 2 employer, the City of Waterloo is compulsorily covered through a system of individual liability and must individually pay the total costs of benefits for their injured employees plus an administration fee.



**STAFF REPORT**  
**Facility Design & Management Services**

Title: 404 K-W Wing (Royal Canadian Air Force Association) Lease Agreement  
Report Number: COM2025-032  
Author: Liz Badley, Senior Property Coordinator  
Council Date: December 1, 2025  
File: N/A  
Attachments: None  
Ward No.: 3

**Recommendations:**

1. That Council approve report COM2025-032.
2. That Council approve the lease agreement for 404 K-W Wing (Royal Canadian Air Force Association) for a portion of the building at 510 Dutton Dr, Waterloo, according to the Terms and Conditions as outlined in this report.
3. That the Mayor and Clerk be authorized to sign the Lease Agreement and any other necessary documents, subject to the satisfaction of the City Solicitor.

**A. Executive Summary**

The most recent lease agreement with the 404 K-W Wing, Royal Canadian Air Force Association (RCAFA) will expire on December 31, 2025. The City and 404 K-W Wing seek to enter into a new lease agreement, under the following terms and conditions:

Space: A portion of the building located at the 404 K-W Wing (510 Dutton Dr, Waterloo, ON)

Terms: January 1, 2026 - December 31, 2028

Use: Meeting and events venue

**B. Financial Implications**

This agreement is an in-kind lease agreement with RCAFA, although the tenant has agreed to make an annual contribution towards the building's utility costs.

**C. Technology Implications**

None

**D. Link to Strategic Plan**

(Strategic Priorities: Reconciliation, Equity, Accessibility, Diversity and Inclusion; Environmental Sustainability and Climate Action; Complete Community; Infrastructure and Transportation Systems; Innovation and Future-Ready)

(Guiding Principles: Equity and Inclusion; Sustainability; Integrity; Workplace Wellbeing; Community-centred; Operational Excellence)

Complete Community

**E. Previous Reports on this Topic**

CORP2017-045 Lease Renewal – Wing 404, R.C.A.F.A.



**STAFF REPORT**  
**Fleet & Procurement Services**

Title: Amended Purchasing By-Law  
Report Number: CORP2025-033  
Author: Jason Wilhelm  
Council Date: December 1, 2025  
File:  
Attachments: Appendix A: Amended Purchasing By-Law 2025  
Appendix B: Amended Purchasing By-Law (tracked changes version)  
Ward No.: N/A

**Recommendations:**

- 1) That report CORP2025-033 be approved by Council;
- 2) That By-Law No. 2019-026 (Amended by By-Law No. 2025-09, May 26, 2025) be repealed; and
- 3) That Council approves the By-law to establish policies for the procurement of Goods and Services by the City, attached as Appendix A.

**A. Executive Summary**

The *Municipal Act* requires that all municipalities adopt and maintain policies with respect to the procurement of goods and services.

A review of the City's Purchasing By-Law has been undertaken and resulted in amendments that will support the City's 10-Point US Tariff Response Plan and create greater flexibility and efficiencies in the purchasing process while, maintaining compliance with legislative requirements.

**B. Financial Implications**

There is no direct financial impact as impact is administrative and operational.

**C. Technology Implications**

None

**D. Link to Strategic Plan**

(Strategic Priorities: Reconciliation, Equity, Accessibility, Diversity and Inclusion; Environmental Sustainability and Climate Action; Complete Community; Infrastructure and Transportation Systems; Innovation and Future-Ready)

(Guiding Principles: Equity and Inclusion; Sustainability; Integrity; Workplace Wellbeing; Community-centred; Operational Excellence)

There are links to all Strategic Priorities.

**E. Previous Reports on this Topic**

CORP2025-022 City of Waterloo 10 Point US Tariff Response Plan



**Amended Purchasing By-Law  
CORP2025-033**

**Section 1 – Background**

The City is committed to ensuring that its procurement of goods and services is undertaken in the most economical and efficient manner through a process that is fair, transparent and in compliance with, at a minimum:

- the *Municipal Act*;
- Statutory and common law rules;
- Administrative policies and directives;
- The Canadian Free Trade Agreement (Chapter 5);
- The Canada-European Union Comprehensive Economic and Trade Agreement (Chapter 19);
- *Municipal Freedom of Information and Protection of Privacy Act*; and
- *Business Discriminatory Act*.

The recommended amendments to the Purchasing By-Law detailed below align with these requirements. They also provide flexibility for the City to:

- continue to investigate and support new technologies, post-secondary institutions and start-up companies; and
- for contracts values that fall below the trade agreement thresholds utilize local / Canadian suppliers.

As part of the By-Law review process procurement staff consulted with the City's Executive Corporate Management Team and the Operational Leadership Team. Staff also retained the services of Paul Emmanuelli of the Procurement Law Office who specializes in public procurement law, representing clients across all sectors of government and all regions of Canada to undertake a legal compliance review and perform a gap analysis against procurement industry due diligence standards.

This revised by-law addresses recommendations from these reviews and creates operational efficiencies and improvements.

## Section 2 – Summary of Amendments

Administrative changes made including:

- Updates to the Responsibilities and Authorities section (Section 5) to include the Manager, Procurement and Procurement Division Employee. These were added to provide clarity of the day-to-day functions the procurement team is responsible for;
- Adjustments to position titles to align with the organizational structure of the City. For example, the definition of Director has been expanded to include Deputy Commissioner, Senior Director, Executive Director and the City Solicitor and the Chief Financial Officer reference has been changed to the Commissioner of Corporate Services;
- Amendments to Definitions (Section 3) including Construction, Co-operative Purchasing, Non-Competitive Procurement and Standing Arrangement. A definition for Estimated Purchase Value was added.
- Updating the Sustainable Procurement section (Section 7.2.4) to also reference the City's Social Procurement Policy.

More substantive changes include:

### 1. A revised layout for readability

A Procurement Process Section was created with three subsections:  
Section 7.2 Procurement Planning;  
Section 7.3 Procurement Methods; and  
Section 7.4 Bid Administration.

Most of the content within these new subsections existed within the current by-law. Additions and deletions are detailed below.

### 2. Section 7.2 Procurement Planning

As recommended through the gap analysis, a procurement planning protocol was added to mandate the preparation of clear requirements, realistic costing and scheduling estimates, and the selection of appropriate contract formats and procurement methods.

Section 7.2.5 Estimated Purchase Value was added to provide guidance on how to properly calculate the Estimated Purchase Value, as it is this value that drives the procurement method



### **3. Section 7.3 Procurement Methods**

Section 7.3.3 Competitive Procurement replaces the current Section 10 Standard Procurement Methods to highlight the available procurement methods for publicly advertised procurements. This section also has been adjusted to outline the responsibilities of the various staff involved in the procurement process.

### **4. Section 7.4 Bid Administration**

Section 7.4.6 Evaluation was created to ensure that the City's evaluation processes are based on clear compliance standards, transparent scoring and defensible award processes.

Section 7.4.10 Bidder Debriefings and Section 7.4.11 Procurement Protests were added to address the procedures and standards that need to be followed to ensure transparency and the management of bid disputes.

### **5. Section 8 Contract Management and Administration.**

This section was added to address a gap identified through the legal compliance review. It highlighted the need for a protocol to identify roles and responsibilities for contract administration.

### **6. Section 10 Records Retention and Access to Information**

This section was created to strengthen our protocols around the retention and access to procurement records. This section was created in collaboration with the Legislative Services Division to ensure compliance with all legislative requirements.

### **7. Amended Schedule "C" Thresholds of Procurement**

Schedule C has been revised to:

- i) Increase the maximum threshold for a low-cost purchase that can be facilitated by the division requiring the goods and / or services using a Limited or Non-Competitive procurement method from \$50,000 to \$75,000. This creates efficiencies in the procurement process as it allows divisional staff to procure low-cost items enabling procurement staff members to focus on complex procurements. Procurement staff would still assist divisions when requested and will continue to monitor, through reports, low-cost expenditures.
- ii) Increase the maximum threshold for undertaking purchases using a Limited Procurement method (one that requires bids be solicited from a minimum of three bidders) from \$100,000 to \$125,000 for Goods and Services and up to \$325,000 for Construction Services. This is in alignment with trade agreement

thresholds and will expedite the purchasing process as it can limit open market timelines and would reduce the volume of evaluations being undertaken for relatively low-cost goods and services thereby reducing staff time and enabling projects to proceed faster. Staff would still be required to work with the Procurement team to undertake these purchases; and

- iii) Provide clarity around the use of Standing Agreements and number of bids required based on different dollar value thresholds.

#### **8. New Schedule “D” Purchasing Statement of Ethics**

As recommended through the gap analysis, this was added to provide guidance to all employees at the City who are involved in procurements to ensure they are adhering to the City’s Code of Conduct Policy as well as best practices in public procurement.

# **Appendix A**



## **THE CORPORATION OF THE CITY OF WATERLOO**

### **BY-LAW NO. 2025 –**

### **By-law to establish policies for the procurement of Goods and Services by the City**

**December 1, 2025**

## Table of Contents

Section Number		Page
1.	PURPOSES, GOALS, AND OBJECTIVES.....	4
2.	APPLICATION OF BY-LAW.....	5
3.	DEFINITIONS .....	5
4.	INTERPRETATION.....	9
5.	RESPONSIBILITIES AND AUTHORITY.....	9
6.	CITY COUNCIL.....	12
7.	PROCUREMENT PROCESS .....	12
8.	CONTRACT MANAGEMENT AND ADMINISTRATION .....	25
9.	CONTRACTOR PERFORMANCE MANAGEMENT.....	25
10.	RECORDS RETENTION AND ACCESS TO INFORMATION .....	26
11.	DISPOSAL OF SURPLUS PROPERTY.....	27
12.	DONATIONS .....	28
13.	SUPPLEMENTARY POLICIES.....	28
14.	SHORT TITLE.....	28
15.	REPEAL .....	28
16.	ENACTMENT.....	29
17.	SCHEDULE “A” .....	30
18.	SCHEDULE “B” .....	32
19.	SCHEDULE “C” .....	35
20.	SCHEDULE “D” .....	37



# THE CORPORATION OF THE CITY OF WATERLOO

## BY-LAW NO. 2025 –

### BY-LAW TO ESTABLISH POLICIES FOR THE PROCUREMENT OF GOODS AND SERVICES BY THE CITY

**WHEREAS** section 270(1)(3) of the *Municipal Act 2001*, S.O. 2001, c. 25, as amended (the “Act”), requires all municipalities to adopt and maintain a policy with respect to the procurement of Goods and Services;

**AND WHEREAS** The Corporation of the City of Waterloo (the “City”) is committed to ensuring its procurement decisions are fair, transparent and non-discriminatory;

**AND WHEREAS** effective planning, monitoring and control of procurement is essential for maintaining public trust and confidence;

**AND WHEREAS** purchases made by the City should reflect best value for the City, protect the City’s financial interests and encourage competitive Bidding;

**AND WHEREAS** effective Contractor performance is critical for the success of City projects. Poor workmanship, unnecessary project delays and unsafe work practices will not be accepted.

**AND WHEREAS** the City should be prepared to manage extraordinary circumstances from time to time, and that such circumstances may require immediate procurement decisions that are necessary to prevent or alleviate serious delay, a threat to public health, safety or welfare, the disruption of essential services or damage to public property or to respond to an emergency or as required under the provincial *Emergency Management and Civil Protection Act*, R.S.O. 1990, c. E.9, as amended;

**AND WHEREAS** effective planning, monitoring and control of the City’s procurement activities is essential for maintaining public trust and confidence;

**NOW THEREFORE** the Council of The Corporation of the City of Waterloo enacts as follows:

## 1. PURPOSES, GOALS, AND OBJECTIVES

- 1.1 The purposes, goals, and objectives of this by-law and of each of the methods of procurement authorized herein are:
  - 1.1.1 To establish standard rules governing the procurement of Goods and Services by City staff;
  - 1.1.2 To obtain the best value for the City when procuring Goods and Services;
  - 1.1.3 To ensure consistency and fairness amongst Bidders during the procurement process;
  - 1.1.4 To the extent possible, ensure openness, accountability and transparency while protecting the financial best interests of the City;
  - 1.1.5 To avoid conflicts between the interests of the City and those of the City's employees and members of Council;
  - 1.1.6 To specify roles and responsibilities of individuals, Divisions and Departments through the procurement process;
  - 1.1.7 To promote respect for human rights, international and inter-provincial trade treaties or agreements and fair labour practices;
  - 1.1.8 To encourage, whenever possible, the procurement of Goods and Services with due regard to the conservation of a natural environment, and that adopt a pro-active approach to climate change;
  - 1.1.9 To promote and incorporate the requirements of the *Accessibility for Ontarians with Disabilities Act, 2005*, S.O. 2005, c. 11, as amended (the "AODA") in procurement activities of the City as well as any requirements contained in other legislation (either provincial or federal) which may impact the procurement activities of the City;
  - 1.1.10 To support effective business planning such that Goods and Services will only be acquired after consideration of need, alternatives, timing and appropriate life cycle management issues;
  - 1.1.11 To mitigate risk in future contracts through monitoring, measuring and recording Contractor performance,
  - 1.1.12 To comply with the requirements of the Act, and
  - 1.1.13 To support, whenever possible, Canadian Businesses by providing greater access to procurement opportunities.

## 2. APPLICATION OF BY-LAW

2.1 This by-law shall apply to purchases by staff in all Departments of the City, including Committees of the City with designated budgets who must coordinate with City staff to facilitate any purchase of Goods or Services.

2.1.1 Notwithstanding section 2.1, this by-law shall not apply:

2.1.1.1 to the purchase of those Goods and Services set out in **Schedule “A”**; and

2.1.1.2 subject to Section 7.3.6, where the City is engaged in Co-operative Purchasing and where another municipality, government agency or member of the Broader Public Sector is purchasing Goods and Services on the City’s behalf.

2.2 All City of Waterloo elected officials and staff shall comply with the Purchasing By-law for the City of Waterloo. Without limiting the foregoing, such elected officials and staff comply with the Purchasing Statement of Ethics attached as Schedule D to this by-law.

2.3 No contract for Goods and Services shall be structured in such a manner so as to circumvent any intent or thresholds of this by-law.

## 3. DEFINITIONS

3.1 In this by-law:

3.1.1 “Authority Limit” means the maximum monetary value delegated to specific staff positions or Council;

3.1.2 “Bid” includes a Bid, proposal, quotation and tender;

3.1.3 “Bid Bond” means a written guaranty from a third-party guarantor submitted to a principal (client or customer) by a Contractor (Bidder) along with a Bid which insures against non-performance of the Bid document’s requirements on the acceptance of a Bid;

3.1.4 “Bid Irregularity” means a deviation from the requirements of a call for Bid;

3.1.5 “Bidder” means one who submits a response to any call for a Low Cost Purchase, Competitive or Non-Competitive procurement;

3.1.6 “Canadian Business” means a supplier, manufacturer or distributor of any business structure that conducts its activities on a permanent basis in Canada. The business either:

- i. has its headquarters or main office in any province or territory within Canada, or

- ii. has at least 250 full-time employees in any one province or territory within Canada at the time of the applicable procurement process;
- 3.1.7 “Chief Administrative Officer” or “CAO” means the Chief Administrative Officer of the City or his or her designate;
- 3.1.8 “Chief Financial Officer” or “CFO” means the Chief Financial Officer and Treasurer of the City or his or her designate;
- 3.1.9 “City Solicitor” means the Director of Legal Services, or his or her designate, or outside legal counsel as determined by the Director of Legal Services from time to time;
- 3.1.10 “City” means The Corporation of the City of Waterloo;
- 3.1.11 “Commissioner” means a person with administrative responsibilities for a Department of the City, or his or her designate;
- 3.1.12 “Commitment Approval” means the authorization to use approved budgeted funds up to an allowable Authority Limit but does not include the authority to sign any contract, except where permitted by the By-Law To Delegate Authority to Execute Documents or other City policies;
- 3.1.13 “Contractor” means a person or firm having a contract with the City to furnish Goods and/or Services;
- 3.1.14 “Construction” means a service that has as its objective the realization by whatever means of civil or building works, based on Division 51 of the United Nations Provisional Central Product Classification. For clarity, Construction does not include Consulting Services relating to construction;
- 3.1.15 “Consultant” means a person or firm that provides Consulting Services;
- 3.1.16 “Consulting Services” means the provision of expertise or strategic advice that is presented for consideration and decision-making;
- 3.1.17 “Co-operative Purchasing” means a procurement method where the City of Waterloo leverages existing contracts established by other public sector entities or group purchasing organizations creating contracts on behalf of municipalities, publicly funded or public sector entities;
- 3.1.18 “Corporate Management Team” or “CMT” means the group consisting of the CAO and the Commissioners of all Departments;
- 3.1.19 “Council” means the Council of the City;



- 3.1.20 “Covered Procurement” means procurement for governmental purposes for which the value equals or exceeds the relevant thresholds set out in the in the Canadian Free Trade Agreement or the Canada-European Union Comprehensive Economic and Trade Agreement or any other trade treaty the City may be subject to;
- 3.1.21 “Department” means a collection of Divisions under the control of a Commissioner of the City;
- 3.1.22 “Director” means a Deputy Commissioner, Senior Director, Executive Director, Director, the City Solicitor, the City Clerk or a Deputy Fire Chief of the City, or his or her designate, who is responsible for a specific Division;
- 3.1.23 “Director of Procurement” means the Director of Fleet and Procurement of the City, or his or her designate, who is under the general direction of the Commissioner of Corporate Services;
- 3.1.24 “Division” means a part of a Department of the City;
- 3.1.25 “Donation” means a cash and/or in-kind contribution made to the City with no reciprocal commercial benefit expected or required from the City. Donations do not involve a business relationship and are distinct from sponsorship and/or advertising initiatives;
- 3.1.26 “Emergency” means a situation or threat or an impending situation which may affect the environment, life, safety, health or welfare of the general public or the property of the residents of the City that requires immediate repair or replacement of equipment, services, or facilities in order to prevent or mitigate the loss or impairment of life, health, essential services or property within the City;
- 3.1.27 “Estimated Purchase Value” means the factor that determines the allowable procurement method. In determining the Estimated Purchase Value consideration must be given to the total value of the procurement over its entire duration, whether awarded to one or more suppliers, taking into account all forms of remuneration, including (i) premiums, fees, commissions and interest; and (ii) the total value of renewals if the procurement provides for the possibility of renewals; (iii) the value of any contingent payments (e.g. cash allowances), excluding sales taxes;
- 3.1.28 “Goods” means personal property (including the costs of installing, operating, maintaining or manufacturing such personal property) and includes raw materials, products, equipment and other physical objects of every kind and description whether in solid, liquid, gaseous or electronic form, unless they are procured as part of a general construction contract;

- 3.1.29 “Goods and Services” “Goods or Services” means all Goods and/or services including Construction Services and Consulting Services;
- 3.1.30 “In-House Work” is where the provision of Goods and/or Services will be completed entirely by City staff;
- 3.1.31 “Limited Procurement” means a competitive or non-competitive procurement method where one or more suppliers of the City’s choice are invited to Bid;
- 3.1.32 “Manager” means a Manager or his or her designate, who is responsible for a specific Section;
- 3.1.33 “Multi-Use List” means a list of Contractors that the City has determined satisfy the conditions for participation in that list, and that the City intends to use more than once;
- 3.1.34 “Non-Competitive Procurement” means a purchase negotiated directly from one supplier or a purchase made using a Limited Procurement method when an Open Competitive Procurement method is required in accordance with Schedule “C” of this by-law;
- 3.1.35 “Open Competitive Procurement,” means a competitive solicitation method, where a notice of intended procurement is advertised to the public, giving all suppliers an equal opportunity to submit a Bid in response to the solicitation;
- 3.1.36 “Prequalified Contractor” means a Contractor who has submitted a response to an advertised request for prequalification and has been determined to have met the minimum disclosed criteria and standards for technical qualifications and professional competence, and has the necessary equipment, facilities and experience for specific future solicitations;
- 3.1.37 “Purchasing Card” means a card provided by the City to duly authorized City staff to make purchases in compliance with the Purchasing Card Policy;
- 3.1.38 “Procurement Division” means the Section of the City managed by the Director of Procurement”;
- 3.1.39 “Purchase Order” means a contractual agreement with a Contractor that specifies payment terms, delivery dates, item identification, quantities, freight terms and all other obligations and conditions;
- 3.1.40 “Section” means a part of a Division of the City;
- 3.1.41 “Standing Arrangement” means an arrangement developed by the City or under which the City participated in, with a Contractor or Contractors under which the City may purchase Goods and/or

Services from the Contractor(s) through a competitive or non-competitive procurement method over a period specified in the arrangement. The arrangement includes all terms applicable to the procurement, such as the cost of the Goods and Service and delivery requirements;

3.1.42 “Surplus Property” means items no longer having a use to the City and shall include furniture, vehicles, equipment, supplies, and other Goods or materials, which are deemed surplus or which have become obsolete, worn out, or otherwise incapable of use.

- 3.2 To establish the definition of any other purchasing term not herein included, reference shall be made to the latest edition of the National Institute of Governmental Purchasing Inc. (NIGP) Public Procurement Dictionary of Terms.
- 3.3 All monetary amounts outlined in this by-law shall, unless otherwise stated, exclude all applicable taxes.
- 3.4 The monetary thresholds outlined in **Schedule “C”** shall be consistent with the City’s estimated or budgeted amounts for the specific procurement or project, not the amount actually Bid.

#### 4. INTERPRETATION

- 4.1 Headings contained in this by-law are for reference only.
- 4.2 **Schedule “A” - Purchasing Exemptions** is incorporated into and forms a part of this by-law.
- 4.3 **Schedule “B” - Chart of Bid Irregularities or Non-Compliance** is incorporated into and forms a part of this by-law.
- 4.4 **Schedule “C” - Thresholds of Procurement Methods** is incorporated into and forms a part of this by-law.
- 4.5 **Schedule “D” – Purchasing Statement Of Ethics** is incorporated into and forms a part of this by-law.

#### 5. RESPONSIBILITIES AND AUTHORITY

- 5.1 **Director of Procurement – The Director of Procurement is responsible for:**
  - 5.1.1 Providing procurement advice and related services including the necessary forms, contracts and Bid document templates that may be required by Departments, the CAO and Council for the purposes of fulfilling the procurement needs of the City;

- 5.1.2 Facilitating all aspects of calls for Bids including opening and ensuring compliance with the terms and conditions of the call for Bid;
- 5.1.3 Ensuring compliance with this by-law and associated policies and procedures and reporting non-compliance, in writing, to the appropriate Director, Commissioner or CAO, where warranted;
- 5.1.4 Approve, in consultation with the City Solicitor, by-law exception requests made pursuant to section 7.3.5 herein;
- 5.1.5 The standardization of Goods and Services in conjunction with Divisions, where appropriate and feasible;
- 5.1.6 The consolidation of the procurement of all similar Goods and Services where appropriate and feasible;
- 5.1.7 Ensuring that there is City representation in respect of co-operative purchasing initiatives; and,
- 5.1.8 Complying with the purposes, goals, and objectives of this by-law.

**5.2 Manager, Procurement – The Manager, Procurement is responsible for:**

- 5.2.1 ensuring the consistent application of this by-law and providing procurement services to City staff;
- 5.2.2 developing Procurement strategies and continually analyzing business requirements and spending patterns to identify opportunities for strategic sourcing;
- 5.2.3 researching, developing, maintaining, updating, and communicating procurement protocols, procedures, and templates;
- 5.2.4 addressing any issues or concerns that arise in respect of a procurement process and seeking guidance, support, and advice of the Director of Procurement or Legal Services, as required;
- 5.2.5 providing appropriate orientation, training, and tools to City staff involved in procurement activities; and
- 5.2.6 Assisting Divisions with the disposal of Surplus Property;

**5.3 Procurement Division Employees - Procurement Division Employees are responsible for:**

- 5.3.1 complying with this by-law and ensuring this by-law and all protocols and procedures are applied consistently;
- 5.3.2 providing strategic support, consultation and procurement services to City staff;

- 5.3.3 communicating procurement protocols, procedures, and templates to City staff;
- 5.3.4 training City Staff on this by-law, protocols and forms; and
- 5.3.5 ensuring that all documentation relating to a procurement that is facilitated by the Procurement Division is properly filed and maintained in a procurement project file.
- 5.4 **Commissioners, Directors and Managers** – Commissioners, Directors and Managers are responsible for ensuring that:
  - 5.4.1 all procurement within their respective Departments or Divisions or Sections is in compliance with this by-law and any associated policies and procedures;
  - 5.4.2 no procurement, except for Emergency purchases, shall be contrary to Council's approved budget or any specific direction from the CAO, CFO or Council, unless otherwise authorized by a Council-approved policy;
  - 5.4.3 payments to Contractors are approved for processing within the times set out in the contract, provided the Contractor has met all the conditions of the contract; and,
  - 5.4.4 all Goods and Services contracted for have been received and accepted by the City and appropriate documentation reflecting any approved changes in the terms and conditions of a contract is maintained.
- 5.5 **City Solicitor – City Solicitor is responsible for:**
  - 5.5.1 Creating template contracts and updates as required;
  - 5.5.2 Preparing amendments to contracts;
  - 5.5.3 Preparing negotiated contracts for signature;
  - 5.5.4 Reviewing and advising on interpretation of policies and legislation in relation to the Purchasing By-Law;
  - 5.5.5 Providing legal advice and opinions as required in relation to legal issues arising during or as a result of purchasing activities;
  - 5.5.6 Reviewing and providing legal advice and opinion regarding large, complex or unique purchases.

5.6 **CAO** – The CAO is responsible for ensuring:

5.6.1 that all City staff complies with this by-law.

## **6. CITY COUNCIL**

6.1 The following contract awards shall be subject to Council approval:

6.1.1 any contract prescribed by statute to be made by Council;

6.1.2 any contract that includes third party financing as part of the acquisition of Goods and Services;

6.1.3 any contract where this by-law is being waived;

6.1.4 any contract where Council has expressly directed staff to report prior to an award;

6.1.5 any contract where authority to approve has not been expressly delegated;

6.1.6 any contract where a submission in response to a call for Bid contains an irregularity not resolved by **Schedule “B”** of this by-law and which was not able to be otherwise resolved by the Procurement Division; or,

6.1.7 any contract through a Non-Competitive Procurement process, except where permitted in Schedule C or Section 7.3.5 of this by-law.

6.2 Council may waive, by resolution, the application of any part of this by-law in respect of any given procurement.

## **7. PROCUREMENT PROCESS**

7.1 Procurements shall be undertaken in compliance with the following requirements:

7.1.1 each call for Bid shall be conducted in a fair, transparent, equitable, consistent, non-discriminatory and professional manner; and

7.1.2 the call for Bid document shall be publicly advertised, where required, in accordance with Schedule “C” to maximize the response potential to the call for Bid.

## 7.2 PROCUREMENT PLANNING

7.2.1 Before a Bid can be posted, a comprehensive procurement plan must be developed with the Procurement Division that will consider, at a minimum:

- 7.2.1.1 available budget;
- 7.2.1.2 the procurement method;
- 7.2.1.3 the total estimated cost including all options, as well as maintenance costs, as applicable;
- 7.2.1.4 contract terms and conditions;
- 7.2.1.5 the procurement schedule;
- 7.2.1.6 evaluation procedures and method of selection; and
- 7.2.1.7 contract management requirements.

7.2.2 The requesting Division should, prior to initiating any procurement process for Goods and/or Services:

- 7.2.2.1 Ensure that the Goods and/or Services are legitimately required for City purposes;
- 7.2.2.2 Consider short and long-term requirements with respect to quantities and supply duration, or total project cost considering the life span of the program or project;
- 7.2.2.3 Consider the cost of ongoing maintenance, support, and licensing, etc.;
- 7.2.2.4 Confirm availability of funding;
- 7.2.2.5 Allow sufficient time to complete the procurement process, in accordance with process timelines posted by the Procurement Division; and
- 7.2.2.6 Prepare detailed specifications, statements of work and quantity requirements with the underlying premise of encouraging transparent and fair competition. Specifications must not be developed in a way that are prescriptive to specific branded products/services but instead descriptive of the performance requirements of the product/service needed.

### 7.2.3 REQUIREMENT FOR APPROVED FUNDS

7.2.3.1 The authority to procure Goods and Services or award a contract is subject to the identification and availability of funds in appropriate accounts within Council's approved budget.

7.2.3.2 All purchases which are outside the Council-approved budget shall be subject to the appropriate City budget policy.

### 7.2.4 SOCIAL AND SUSTAINABLE PROCUREMENT

7.2.4.1 All Departments, Divisions and Sections of the City are encouraged to consider the social and environmental impacts of their procurement of Goods and Services to balance fiscal responsibility with social and environmental values. The City's Social Procurement Policy shall be considered for the procurement of Goods and Services.

### 7.2.5 ESTIMATED PURCHASE VALUE

7.2.5.1 The Estimated Purchase Value is used to identify recommended procurement methods.

7.2.5.2 The value of a procurement must not be reduced in any attempt to avoid the application of other requirements of this By-Law, including requirements relating to procurement method.

7.2.5.3 Where similar Goods and/or Services are required in connection with one project, all of those Goods and/or Services, including all contemplated phases of the project, shall be included in determining the Estimated Purchase Value.

## 7.3 PROCUREMENT METHODS

7.3.1 Unless otherwise specified in this by-law, Goods and Services shall be purchased or procured in accordance with the methods described in this section and in accordance with Schedule "C" of this by-law.

### 7.3.2 LOW COST PURCHASE ("LCP")

7.3.2.1 A LCP may be conducted for the procurement of Goods and Services having a purchase value up to the limit stated in Schedule "C" of this by-law.



7.3.2.2 A LCP may be made utilizing a purchase order, petty cash, a vendor offered charge account or Purchasing Card or other similar method.

7.3.2.3 A Manager or Director may authorize specific individuals to make LCPs and set monetary limits to that authority, in accordance Schedule "C" of this by-law.

### 7.3.3 COMPETITIVE PROCUREMENT

7.3.3.1 All Competitive Procurements must be Publicly Advertised. The methods for requesting a Bid include, but are not limited to:

7.3.3.1.1 Request for Expression of Interest (REOI);

7.3.3.1.2 Request for Information (RFI);

7.3.3.1.3 Request for Prequalification (RFPQ);

7.3.3.1.4 Request for Proposal (RFP);

7.3.3.1.5 Request for Tender (RFT);

7.3.3.1.6 A multi-step process which may involve a combination of the above.

7.3.3.2 The Procurement Division Employee is responsible for determining the procurement method and conducting and managing the procurement process for all competitive procurements including the evaluation process and the maintenance of Bids, Bidder information and Bid results;

7.3.3.3 The project manager is responsible for determining the requirements and preparing detailed specifications or statements of work and quantity requirements on behalf of their Division;

7.3.3.4 The Procurement Division Employee is responsible for reviewing the specifications or statements of work and quantity requirements, developing an appropriate Bid Request and evaluation method and criteria ensuring that the principles outlined in Section 7 are followed;

7.3.3.5 Following Bid review and/or evaluation and determination of the recommended Bidder(s), approval to Award the Contract(s) is required in accordance with this by-law.

### 7.3.4 NEGOTIATION

7.3.4.1 Negotiation, conducted under the direction of the Director of Procurement and/or the Procurement Division, may be used for the procurement of Goods and Services or for any contract when one or more of the following criteria apply:

- 7.3.4.1.1 due to abnormal market conditions, the Goods and Services required are in short supply or market price fluctuations or instability exists;
- 7.3.4.1.2 where only one Bid is received and it exceeds the amount budgeted for the procurement;
- 7.3.4.1.3 where extending the existing contract was provided for in the original Bid document;
- 7.3.4.1.4 where a Bid document expressly allow for negotiations to occur;
- 7.3.4.1.5 where extraordinary circumstances exist, as determined by the Director of Procurement;
- 7.3.4.1.6 where Council has authorized negotiation; or,
- 7.3.4.1.7 where all submitted Bids are non-compliant with the terms of the call for Bid.

### 7.3.5 NON-COMPETITIVE PROCUREMENTS

7.3.5.1 Unless allowable pursuant to **Schedule “C”** of this by-law, a Non-Competitive Procurement may only be facilitated and negotiated, if:

- 7.3.5.1.1 The circumstances for the Non-Competitive Procurement meet one of the allowable exceptions in 7.3.5.2 below or as may be permitted under the Canadian Free Trade Agreement;
- 7.3.5.1.2 A rationale of how the request represents an allowable exception has been either:
  - i. approved by the Director of Procurement, in consultation with the City Solicitor,
  - ii. or if the request is denied by the Director of Procurement, approved by the Corporate Management Team, in

consultation with the Director of Procurement and the City Solicitor.

7.3.5.1.3 Proper approvals in accordance with Authority Limits have been obtained; and

7.3.5.1.4 The Estimated Purchase Value is below the thresholds for a Covered Procurement and approval has been provided by the Director of Procurement.

7.3.5.2 Non-Competitive Procurements are permitted for Goods or Services of any contract value without the competitive Bid process in the following circumstances (allowable exceptions):

7.3.5.2.1 No compliant Bids were submitted or no Bidders responded to or met conditions for participation under a Bid or request for pre-qualification, or submitted Bids were collusive;

7.3.5.2.2 If the Goods and/or Services can be supplied only by a particular supplier and no reasonable alternative or substitute Goods or Services exist for any of the following reasons:

- i. the requirement is for a work of art;
- ii. the protection of patents, copyrights, or other exclusive rights;
- iii. due to an absence of competition for technical reasons;
- iv. the Supply of goods or services is controlled by a supplier that is a statutory monopoly;
- v. to ensure compatibility with existing Goods, or to maintain specialized goods that must be maintained by the manufacturer of those Goods or its representative;
- vi. work is to be performed on property by a contractor according to provisions of a warranty or guarantee held in respect of the property or the original work; or

- vii. work is to be performed on a leased building or related property, or portions thereof that may be performed only by the lessor.

7.3.5.2.3 For additional deliveries by the original supplier of Goods and/or Services that were not included in the initial procurement, if a change of supplier for such additional Goods or Services:

- i. cannot be made for economic or technical reasons such as requirements of interchangeability or interoperability with existing equipment, software, services, or installations procured under the initial procurement; and
- ii. would cause significant inconvenience or substantial duplication of costs for the City;

7.3.5.2.4 If strictly necessary, and for reasons of urgency brought about by events unforeseeable by the City, the Goods or Services could not be obtained in time using an open Bid process;

7.3.5.2.5 For the purchase of Goods on a commodity market;

7.3.5.2.6 If the City procures a prototype or a first good or service that is developed in the course of, and for, a particular contract for research, experiment, study, or original development. Original development of a first Good or Service may include limited production or supply in order to incorporate the results of field testing and to demonstrate that the Good or Service is suitable for production or supply in quantity to acceptable quality standards, but does not include quantity production or supply to establish commercial viability or to recover research and development costs;

7.3.5.2.7 If a contract is awarded to the winner of a design contest, provided that:

- i. The contest has been organized in a manner that is consistent with the

advertising requirements set out in Schedule A; and

- ii. The participants are judged by an independent jury with a view to a design contract being awarded to a winner.

7.3.5.2.8 For the purchase of Goods under exceptionally advantageous circumstances such as liquidation, bankruptcy or receivership, but not for routine purchases from regular Contractors;

7.3.5.2.9 For procurements that target poverty reduction for disadvantaged natural persons if the value of the procurement is below \$200,000; or

7.3.5.2.10 If Goods or Services regarding matters of a confidential or privileged nature are to be purchased and the disclosure of those matters through an open tendering process could reasonably be expected to compromise government confidentiality, result in the waiver of privilege, cause economic disruption or otherwise be contrary to the public interest.

#### 7.3.6 CO-OPERATIVE PURCHASING

7.3.6.1 The City may participate with other government agencies or members of the Broader Public Sector in co-operative purchasing initiatives where it is in the best interests of the City to do so.

7.3.6.2 The purchasing policies of the originating co-operative (or lead agency) shall form the basis of accepted policy and procedure when participating in, or calling, co-operative Bids and this by-law shall be otherwise waived. The City will review the originating co-operatives' purchasing policies before entering a co-operative purchasing arrangement.

#### 7.3.7 UNSOLICITED SUBMISSIONS, PROPOSALS AND OFFERS

7.3.7.1 All unsolicited submissions, proposals and offers received by the City if being considered shall be directed to the Director of Procurement for review with the Director or Commissioner of the appropriate Division or Department for their review.

- 7.3.7.2 If it is determined that there is a legitimate need for the Goods and/or Services offered by way of an unsolicited proposal, then a procurement process shall be conducted in accordance with this By-law.

#### 7.3.8 EMERGENCY PURCHASES

- 7.3.8.1 Notwithstanding any of the provisions of this by-law, Goods and Services may be immediately purchased during an Emergency, as determined by any of the CAO, CFO, the Director of Procurement, or a Commissioner, which includes a circumstance where there is a threat to any of the following:

- 7.3.8.1.1 public health;
- 7.3.8.1.2 the maintenance of essential services or to prevent the disruption of essential services;
- 7.3.8.1.3 the welfare of persons or of public property; or,
- 7.3.8.1.4 the security of the City's interests.

- 7.3.8.2 Notwithstanding any of the provisions of this by-law, any of the CAO, CFO, the Director of Procurement, or a Commissioner, shall have the necessary authority to secure any Goods and Services required, in an efficient, expeditious manner for all Emergency purchases using a Purchasing Card or Purchase Order. In the case of an after-hours emergency, a Purchase Order will be issued the next regular business day.

- 7.3.8.3 If the value of the Emergency purchase exceeds the value permitting Limited Procurements as outlined in Schedule "C", as soon as is practicable after an emergency purchase has been made, the appropriate Director or Commissioner shall forward a report to Council outlining:

- 7.3.8.3.1 the nature of the Emergency;
- 7.3.8.3.2 why the Emergency purchase was necessary;
- 7.3.8.3.3 the method by which the Emergency purchase was conducted; and,
- 7.3.8.3.4 the total cost of the Emergency purchase, including any budgetary impacts.

### 7.3.9 IN-HOUSE WORK

- 7.3.9.1 For any studies, assessments, evaluations, renovations, surveys, construction and any other work involving City-owned lands, infrastructure and facilities the City reserves the right, to conduct such activities using its own staff and resources.

## 7.4 BID ADMINISTRATION

### 7.4.1 CONSULTING SERVICES

- 7.4.1.1 Consulting Services over one hundred and twenty five thousand dollars (\$125,000) shall be procured by RFP, Multi-Use List, Standing Arrangement, or Co-operative Purchasing Arrangement, unless a Non-Competitive Procurement process is permitted under Schedule "C" Threshold of Procurement Methods or is approved in accordance with Section 7.3.5.
- 7.4.1.2 When evaluating an RFP for consulting services required under 7.4.1.1, the criteria of "price" shall be scored at least thirty five percent (35%), unless the criteria of price is negotiated in accordance with Section 7.3.4.1.4.
- 7.4.1.3 Notwithstanding Section 7.4.1.2, the City may include as part of its evaluation criteria the requirement that a Bidder meet a defined minimum technical score in order to have its Bid considered.
- 7.4.1.4 Consultants may be hired in, but not limited to, any the following circumstances:
  - 7.4.1.4.1 the project requires special knowledge, skills, expertise, experience or available resources which the City does not possess in-house;
  - 7.4.1.4.2 another organization is partially or wholly funding the project and strict timelines have been placed on the funding; or,
  - 7.4.1.4.3 the nature of the project is such that it would not be in the public or City's interest to perform it in-house, as determined by the appropriate Director, in consultation with the Director of Procurement.
- 7.4.1.5 Under this section, all Consultant proposals procured by RFP shall include, at a minimum:

- 7.4.1.5.1 a methodology and timetable to complete the project;
- 7.4.1.5.2 demonstrated experience and qualifications required to perform the project; and,
- 7.4.1.5.3 a list of personnel who will be directly involved in the completion of the project.
- 7.4.1.6 Proposals for Consulting Services shall be evaluated by a panel consisting of at least three (3) people, including a minimum of two (2) City staff members familiar with the project or the Services being acquired.
- 7.4.1.7 All of the members of the evaluation panel described in section 7.4.1.6 of this by-law must participate in the evaluation process and score the proposal.
- 7.4.1.8 The liaison Councillor may be invited to join the evaluation panel described in section 7.4.1.6 of this by-law but, if invited, the liaison Councillor shall comply with section 7.4.1.7 of this by-law.

#### 7.4.2 BID IRREGULARITIES

- 7.4.2.1 Where a Bid is received that includes an irregularity, the City shall follow the protocol as appropriate for the particular irregularity, as outlined in Schedule "B".

#### 7.4.3 ONLY ONE BID RECEIVED

- 7.4.3.1 In the event only one Bid is received in response to a competitive Bid, the Director of Procurement may return the unopened Bid to the Bidder. In returning the unopened Bid, the Director of Procurement shall inform the Bidder that the City may be re-issuing the competitive Bid at a later date.
- 7.4.3.2 In the event that only one Bid is received in response to a request for competitive Bid, the Bid may be opened and evaluated.
- 7.4.3.3 If the Bid does not exceed the amount budgeted, it may be awarded in accordance with this by-law.
- 7.4.3.4 Where the Bid exceeds the amount budgeted for the procurement, negotiations may be conducted with the only Bidder, in accordance with this by-law.



#### 7.4.4 EXCLUSION OF BIDDERS

7.4.4.1 If there is supporting evidence, the City may exclude all Bids submitted by a Bidder on grounds such as:

- 7.4.4.1.1 that Bidder is engaged in a legal action or there is a potential of legal action with the City unless waived by the City Solicitor;
- 7.4.4.1.2 bankruptcy or insolvency under the Bankruptcy and Insolvency Act, RSC 1985, C B-3 (BIA), or any application or assignment under the BIA or the Companies' Creditors Arrangement Act, RSC 1985, c C-36;
- 7.4.4.1.3 false declarations;
- 7.4.4.1.4 significant or persistent deficiencies in performance of any substantive requirement or obligation under a prior contract or contracts;
- 7.4.4.1.5 final judgments in respect of serious crimes or other serious offences;
- 7.4.4.1.6 professional misconduct or acts or omissions that adversely reflect on the commercial integrity of the Bidder;
- 7.4.4.1.7 failure to pay taxes; and
- 7.4.4.1.8 compliance with Provincial and/or Federal government directives for procurements.

#### 7.4.5 NO LOBBYING

- 7.4.5.1 Unless authorized by the City to do so, no Bidder shall contact any member of Council or any City staff person to attempt to influence the award of a contract.
- 7.4.5.2 If a Bidder contacts any member of Council or any City staff person to attempt to influence the award of a contract, the Bidder shall be disqualified, unless the Bidder's actions have been authorized by the City.

#### 7.4.6 EVALUATION

- 7.4.6.1 Evaluation criteria must be clearly disclosed in the procurement documents.

7.4.6.2 Evaluation criteria must not be developed in a way that create hidden evaluation criteria.

7.4.6.3 All participants in the evaluation process must be trained on the particulars of that specific evaluation process, including their role, responsibilities and obligations during the evaluation process. Individuals who have not been trained on the evaluation process or have not complied with the City's evaluation procedures will not be eligible to evaluate bids for that procurement and will not be permitted to participate in that procurement's evaluation process.

#### 7.4.7 TIE BIDS

In the event that two (2) or more compliant, equal Bids are submitted during a competitive Bid process, the City shall determine the successful Bidder by drawing a Bidder's name from a receptacle or by flipping a coin, as determined by the Director of Procurement.

#### 7.4.8 LOCAL OR GEOGRAPHICAL PREFERENCE

7.4.8.1 The City shall comply with the *Discriminatory Business Practices Act*, R.S.O. 1990, c. D.12, as amended.

7.4.8.2 Notwithstanding section 7.4.8.1 the City may when trade agreements allow, limit its tendering to Canadian goods, services, or suppliers or as part of its evaluation criteria accord a preference for Canadian value-add.

#### 7.4.9 PURCHASING APPROVALS

7.4.9.1 All Commitment Approvals and subsequent execution of contract documents, including contract changes resulting in increases in contract value must be approved in accordance with the City's By-Law to Delegate Authority to Execute Documents or other City policies.

#### 7.4.10 BIDDER DEBRIEFINGS

7.4.10.1 Where the City has conducted a competitive procurement process, unsuccessful Bidders may request a debriefing. Debriefings must be managed and responded to in accordance with the City's Debriefing Protocol.

#### 7.4.11 PROCUREMENT PROTESTS

- 7.4.11.1 Suppliers may formally protest the outcome of a procurement process. Formal protests must be made by Bidders and must be managed and responded to by the City in accordance with the City's Procurement Protest Protocol.

### 8. CONTRACT MANAGEMENT AND ADMINISTRATION

- 8.1 All contracts must be managed by the respective City staff in accordance with this By-law and all applicable procedures and protocols to ensure that both the City and the supplier fulfil the requirements of the contract. City staff must involve the Procurement Division and Legal Services in the management of contract disputes, as required by applicable procedures and protocols.
- 8.2 When managing contracts, attention should be paid to ensure that:
  - 8.2.1 payments are in accordance with the provisions of the Contract;
  - 8.2.2 performance is managed and documented, and any performance issues are addressed as per Section 9 of this by-law
  - 8.2.3 procurement documents, including the contract, identify the framework under which price increases will be permitted including, but not limited to, the frequency of price increases, allowable amount of increase, and any benchmarks (including inflation indices) that will be used to confirm the price increase.

### 9. CONTRACTOR PERFORMANCE MANAGEMENT

- 9.1 The City may, for any contract created pursuant to this By-law, undertake performance evaluation during or after completion of the contract.
- 9.2 Documented performance on any City Contract may:
  - 9.2.1 Determine the eligibility of a Contractor or Consultant to continue to provide Goods, Services or Consulting Services to the City;
  - 9.2.2 Determine the eligibility of a Contractor or Consultant to participate in future Bid opportunities;
  - 9.2.3 Be considered as part of the evaluation criteria for any future Bid opportunities.

- 9.3 Performance evaluations and corrective actions will be conducted in an appropriate and consistent manner, in accordance with the City's Supplier Performance Evaluation Program (the "Program").
- 9.4 The Director of Procurement is responsible:
  - 9.4.1 for the implementation and oversight of the Program, including suspending or placing any Contractor or Consultant on probation as permitted under the Program;
  - 9.4.2 for maintaining a list of Contractors or Consultants status under the Program;
  - 9.4.3 to ensure that all Bidders have access to the Program and performance evaluation criteria; and
  - 9.4.4 to ensure reference to the Program is detailed in all Bids that are subject to the Program.
- 9.5 Prior to issuing a formal notice of suspension as permitted under the Program, the Director of Procurement will consult with the City Solicitor.
- 9.6 Commissioners, Directors and Managers are responsible to ensure that their Departments, Divisions and Sections monitor and document a Contractor's performance and comply with their obligations under and the requirements of the Program.

## **10. RECORDS RETENTION AND ACCESS TO INFORMATION**

### **10.1 Records Retention**

- 10.1.1 All procurement records, including contracts, bids, supporting documentation, and related correspondence, are the property of the City and must be retained in accordance with the City's Retention By-Law 2013-071, as amended, and any applicable policies and procedures.
- 10.1.2 The official record of all contracts executed pursuant to this policy shall be retained in the City's designated electronic or physical records management system.
- 10.1.3 Procurement records required for reporting, auditing, or operational purposes must be maintained in a recoverable form in accordance with The City of Waterloo Records Classification and Retention Schedule established under By-Law 2013-071. Records shall not be destroyed except under the authority of By-Law 2013-071.

## **10.2 Access to Information**

10.2.1 The disclosure of procurement information must be made in accordance with applicable City's policies, procedures and protocols, in compliance with the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), R.S.O. 1990, c. M.56, as amended, and the Personal Health Information Protection Act (PHIPA), 2004, S.O. 2004, c. 3, Sched. A, as amended, where applicable.

10.2.2 The disclosure of information relating to the issuance of competitive bids and/ or the award of contracts shall be made in accordance with MFIPPA, s. 4 by the City Clerk or their designate.

## **11. DISPOSAL OF SURPLUS PROPERTY**

11.1 Any Surplus Property not required by Division that has a residual value, as determined by the appropriate Director, shall be sold or disposed of in accordance with one of the following methods, as jointly determined by the Director of Procurement and the appropriate Director:

11.1.1 Call for Bid: If it is determined by the Director of Procurement and the appropriate Director that the highest return for Surplus Property is by a call for Bid, a Bid shall be issued;

11.1.2 Public auction: If it is determined by the Director of Procurement and the appropriate Director that the highest return for Surplus Property is by public auction, the Procurement Division shall arrange for the Surplus Property to be sold at a public auction;

11.1.3 Return to supplier: If it is determined by the Director of Procurement and the appropriate Director that a higher return net of disposal cost can be achieved by sale or trade-in of the Surplus Property to the original supplier or suppliers in that line of business, the appropriate Director shall sell or trade in such Surplus Property at the highest return;

11.1.4 In accordance with policy: If Council has established a policy in relation to the disposal of certain types of Surplus Property, then the provisions of that policy shall be followed by the Director of Procurement; or,

11.1.5 The Division may notify community interest, non-profit organizations or other levels of government of the relevant items for disposal and, request they submit to the appropriate Director, a letter of interest.

- 11.2 Any Surplus Property not required by Departments and that has no residual value, as determined by the appropriate Director, shall be disposed of in accordance with one of the following methods, as determined by the Director of Procurement and appropriate Director:
- 11.2.1 The Division may notify a single community interest, non-profit organization or other levels of government of the relevant items for disposal and request they submit, to the appropriate Director, a letter of interest;
  - 11.2.2 The Divisions may dispose of the items directly through the applicable waste process;
  - 11.2.3 Public auction: the Procurement Division shall offer the Surplus Property for sale through a public auction.
- 11.3 No staff member or Councillor of the City shall personally obtain any Surplus Property with a value of more than \$100.00 unless it is obtained through a public process.
- 11.3.1 Notwithstanding section 11.3, a staff member or Councillor of the City may personally obtain Surplus Property at a price determined jointly by the Director of Procurement and the Director of Information Management & Technology Services, or his or her designate, without going through a public process if the property being obtained is information technology, such as a computer, laptop, or cell phone.

## **12. DONATIONS**

- 12.1 The City may accept Donations for Goods and Services, at Council's sole and absolute discretion.

## **13. SUPPLEMENTARY POLICIES**

- 13.1 Council may prescribe supplementary policies, not inconsistent with this by-law, relating to the purchasing procedures or policies of the City, as Council deems necessary or expedient.

## **14. SHORT TITLE**

- 14.1 The short title of this by-law shall be the "Purchasing By-Law".

## **15. REPEAL**

- 15.1 By-Law 2019-026 (Amended by By-Law No. 2025-09, May 26, 2025) is hereby repealed.

**16. ENACTMENT**

16.1 This by-law shall come into force and effect upon the day of passing thereof.

**Enacted** this \_\_\_\_\_ day of \_\_\_\_\_, 2025.

---

**D. McCabe, Mayor**

---

**J. Finley-Swaren, City Clerk**

## **17. SCHEDULE “A”**

### **PURCHASING EXEMPTIONS**

This by-law does not apply to the following purchases:

1. Training and Education
  - Conferences, conventions, courses and seminars
  - External continuing education fees, workshops and seminars
  - Magazines, books, periodicals and subscriptions
  - Memberships, association fees or dues
2. Refundable Employees' Expenses
  - Advances (Cash)
  - Meal allowances
  - Taxi fare charges
  - Travel, hotel accommodations expenses
3. City's General Expenses
  - Bank charges
  - Charges to and from other government bodies
  - Collective agreements
  - Damage claims
  - Debenture payments
  - Election expenses including Electronic equipment and ballots (For greater certainty, the City Clerk is exempt from this by-law pursuant to the *Municipal Elections Act*, 1996, S.O. 1996, c. 32, Sched., as amended, in relation to election-related expenses).
  - Fees and charges payable to the Federal and Provincial Government
  - Insurance premiums
  - Licenses (vehicle, firearms, elevators, communications, etc.)
  - Postage
  - Property Rentals
  - Refunds
  - Tax remittances
  - Wages
4. Professional and Special Services
  - Actuarial services and expenses
  - Arbitrator services
  - Committee fees
  - Easements, encroachments and licenses
  - Electronic equipment and ballots for election purposes
  - Employee benefit premium payments
  - Honorariums
  - Insurance claims
  - Investments
  - Legal services
  - Medical, dental, laboratory and pharmacy fees



- Mortgage/loan payments
  - Payments to local boards
  - Payroll deduction remittances
  - Permits certificates acquired through Government agencies
  - Real estate fees or land transfer taxes
  - Real estate transactions, including buying, selling or leasing real property
  - Registry office fees
  - Research assignments
  - Revenue collected on behalf of a third party
  - Witness fees
5. Utilities (monthly charges)
    - Cable Television
    - Hydro
    - Natural Gas
    - Telephone (excluding cellular)
    - Water and Sewer
  6. Payments to educational institutions
  7. Payment to recreation program facilitators or hosts
  8. Events or engagements supporting local non-profit organizations
  9. Entertainers for theatre or special events
  10. Expenses related to an event which it is anticipated will be recovered in full from a third party
  11. Any purchases relating, either directly or indirectly, to a site plan agreement, a subdivision agreement or any other agreement or requirement that is specified in the *Planning Act*, R.S.O. 1990, c. P.13, as amended.
  12. Procurement of Goods intended for resale to the public.
  13. Procurement of Goods or Services on behalf of an entity not covered by this by-law.
  14. Procurements between enterprises that are controlled by or affiliated with the same enterprise or between one government body or enterprise and another government body or enterprise.
  15. Any forms of assistance such as grants, loans, equity infusions, guarantees and fiscal incentives.
  16. Non-legally binding agreements.
  17. Procurement of Goods or Services financed primarily from donations that require the procurement to be conducted in a manner inconsistent with this by-law.

## 18. SCHEDULE “B”

### CHART OF BID IRREGULARITIES OR NON-COMPLIANCE

**Notes:**

- I) The following list of Bid Irregularities should not be considered exhaustive.
- II) This chart of Bid Irregularities shall apply only where an irregularity exists with respect to a stated requirement of a relevant competitive Bid document (e.g. an RFQ, RFT or RFP) or a RFI issued by the City.
- III) Where notice of a specified time-period to correct an irregularity has been given, or extended by the City and that time period, or extended time period, has elapsed without the correction having been made, the Bidder shall be deemed to be in default and, where applicable, the Bid deposit shall be forfeited. The Bid shall be given no further consideration for award.

ITEM	IRREGULARITY	RESPONSE
<b><u>GENERAL</u></b>		
1.	Bidder, at the time of submission, is not registered to carry on business in Ontario	Rejection.
2.	Late submissions.	Rejection. The submission will not be opened. Should it not be clear as to the Bidder's name and address then the package will be opened solely to access this information.
3.	Unsealed submission package.	Rejection unless, in the opinion of the Director of Procurement, the unsealed submission package did not result in missing information would adversely affect an award decision.
4.	Bidder has not been previously qualified under a related pre-qualification process, where applicable.	Rejection.
5.	Failure to have a representative in attendance and registered at a mandatory attendance site/information meeting.	Rejection.
6.	Failure to include the Form of Tender, Quotation, Proposal or Pre-Qualification, as may be applicable.	Rejection, unless, in the opinion of the Director of Procurement, the missing information is minor and would not adversely affect an award decision.
7.	Omission of a detail indicated to be mandatory.	Rejection.

ITEM	IRREGULARITY	RESPONSE
8.	Forms that compose the submission documents are not completed in their entirety.	Rejection, unless, in the opinion of the Director of Procurement, the missing information is minor and would not adversely affect an award decision.
9.	Conditional Bids (Bids qualified, based on a Bidder's condition or restricted by an appended statement).	Rejection, unless, in the opinion of the Director of Procurement, the qualification or restriction is minor and would not adversely affect an award decision.
10.	Bids containing clerical errors that do not result in any ambiguity with respect to the overall submission or award decision, in the opinion of the Director of Procurement.	Two (2) business days to correct and initial.
11.	Failure to acknowledge addenda.	Rejection, unless, in the opinion of the Director of Procurement, the failure to acknowledge was an oversight and the contents of the addenda would not adversely affect an award decision.
12.	Any irregularity or non-compliance.	Despite the provisions herein contained, Council may waive any irregularity or non-compliance.
<b><u>PRICING</u></b>		
13.	Failure to include the schedule(s) of items & prices, price form or price details, as may be applicable, for inclusion with the submission.	Rejection, unless, in the opinion of the Director of Procurement, the missing information is minor and would not adversely affect an award decision.
14.	Pricing appears to be unbalanced to the extent that it may have a significant adverse effect to the City if awarded, in the opinion of the Director of Procurement.	Rejection.
<b><u>BID DEPOSIT</u></b>		
15.	Bid deposit or Bid Bond not submitted with Bid.	Rejection.
20.	Bid deposit or Bid Bond amount is insufficient by more than \$1,001.	Rejection.
21.	Surety provider's or Bidder's authorized signature missing from Bid Bond.	Rejection.
22.	Effective period of Bid Bond is less than the period set out in the Bid documents.	Rejection.

ITEM	IRREGULARITY	RESPONSE
<b><u>AGREEMENT TO BOND</u></b>		
23.	Agreement to bond not submitted with Bid.	Rejection.
24.	Agreement to bond not in the form specified.	Rejection.
25.	Agreement to bond amount is insufficient by more than \$1,001.	Rejection.
26.	Surety provider's or Bidder's authorized signature missing from agreement to bond.	Rejection.
<b><u>POST AWARD NOTIFICATION</u></b>		
27.	Failure to execute required bonding or financial security within the prescribed time-period.	Rejection and Bid deposit forfeiture.
28.	Failure to execute a contract within the prescribed period.	Rejection and Bid deposit forfeiture.
29.	Failure to provide supporting documents, as specified within the Bid document and within the prescribed period.	Rejection and Bid deposit forfeiture.

**19. SCHEDULE “C”**  
**THRESHOLDS OF PROCUREMENT METHODS**

# Schedule "C" - Threshold of Procurement Methods

	Allowable Procurement Methods	Procurement Threshold (Estimated Purchase Value <sup>1</sup> excluding tax)	Procurement Responsibility
Low Cost Purchase Up to \$75,000	Non-Competitive Purchase using Pcard or Purchase order	All purchases up to \$10,000	Section/Division requiring goods and and/or services. Purchasing Card Purchases must comply with the Provisions of the Purchasing Card Policy.
	Non-Competitive Purchase through direct negotiation		
	Limited Procurement (Invitational) <b>using Informal Request for Quotations (IRFQ) Template</b> ; Standing Arrangement; Multiuse List	All purchases up to \$75,000	
Purchases Up to \$125,000	Non-Competitive Purchase through direct negotiation; or using Standing Arrangement or Multi-Use List	All purchases over \$75,000 up to \$125,000	Procurement Activities undertaken <b>by Procurement Team</b> . Cooperative Purchasing Arrangements <b>coordinated through Procurement Team</b>
	Limited Procurement (Invitational) bids may be solicited from 2 or more bidders		
	Standing Arrangement/Multi-Use List bids may be solicited from 2 or more Bidders		
	Co-operative Purchasing Arrangement		
	Open Competitive Publicly Advertised		
Purchases over \$125,000	Non-Competitive Procurement through direct negotiation; or using Standing Arrangement or Multi-Use List	For purchases over \$125,000 only permitted if approvals as set out in this by-law have been obtained. <sup>2</sup>	Procurement Activities undertaken <b>by Procurement Team</b> . Cooperative Purchasing Arrangements <b>coordinated through Procurement Team</b>
	Limited Procurement (Invitational) All Services <b>except</b> Construction. Competitive bids to be solicited from a minimum of 3 Bidders	For purchases over \$125,000 only permitted if approvals as set out in this by-law have been obtained. <sup>2</sup>	
	Limited Procurement (Invitational) for Construction Services. Competitive bids to be solicited from a minimum of 3 Bidders	For purchases over \$125,000 up to \$325,000. For purchases over \$325,000 only permitted if approvals as set out in this by-law have been obtained. <sup>2</sup>	
	Standing Agreement / Multi Use List - competitive bids to be solicited from a minimum of <b>3</b> Bidders	Purchases over \$125,000 Up to \$249,999	
	Standing Agreement / Multi Use List - competitive bids to be solicited from a minimum of <b>5</b> Bidders	Purchases \$250,000 up to \$749,999	
	Standing Agreement / Multi-Use List - competitive bids to be solicited from <b>all</b> Bidders on the list	Purchases over \$750,000	
	Co-operative Purchasing Arrangement	Purchases over \$125,000	
	Open Competitive Publicly Advertised	Purchases over \$125,000	
Emergency Purchases	Emergency Purchase	\$ Any Value	Purchase to be carried out in accordance with the provisions of this by-law
<sup>1</sup> <b>Estimated Purchase Value</b> is the factor that determines the allowable procurement method. In determining the Estimated Purchase Value consideration must be given to the total value of the procurement over its entire duration, whether awarded to one or more suppliers, taking into account all forms of remuneration, including (i) premiums, fees, commissions and interest; and (ii) the total value of renewals if the procurement provides for the possibility of renewals; (iii) the value of any contingent payments (e.g. cash allowances), excluding sales taxes.			
<sup>2</sup> Refer to Non Competitive Procurement approvals in Section 7.3.5.			

## **20. SCHEDULE “D”**

### **PURCHASING STATEMENT OF ETHICS**

All individuals authorized to purchase goods, services, and/or construction on behalf of the City of Waterloo must adhere to the City’s Code of Conduct Policy and the following procurement principles:

1. Open and Honest Dealings with All Involved in the Procurement Process
  - Procurement activities must be transparent and accountable. This includes interactions with all businesses the City contracts with or purchases from, as well as all staff members and the public who utilize procurement services.
2. Fair and Impartial Award Recommendations for All Contracts and Tenders
  - Contracting and procurement activities must be fair, transparent, and aimed at obtaining the best value for public money. Preferential treatment to any vendor, including local companies, is prohibited to ensure fair and open competition.
3. An Irreproachable Standard of Personal Integrity
  - Individuals involved in procurement must act with integrity and professionalism. Honesty, care, and due diligence are essential. Respect for each other and the environment is paramount. Confidential information must be safeguarded, and conflicts of interest must be avoided.
4. Cooperation with Other Public Agencies
  - The City will collaborate with other public agencies to achieve the best value for every tax dollar. This includes participating in cooperative purchasing groups to leverage collective expertise and resources.
5. Continuous Development of Procurement Skills and Knowledge
  - All procurement team members are encouraged to continuously improve their knowledge and skills through available opportunities, ensuring adherence to good public purchasing principles.
6. Declaration of Conflicts
  - All participants in a procurement process, including external consultants or service providers acting on the City's behalf, must declare any perceived, possible, or actual conflicts of interest.
7. Personal Purchases
  - No purchase will be processed for personal items of direct benefit to officers or employees of the City or any member of Council, except where permitted by policy.

8. Purchases from City Employees

- No Deliverables will be purchased from an officer or employee of the City, or any associate or immediate family member, except where permitted under this by-law.

9. Conflict of Interest Forms

- All City employees and others participating in the evaluation for any procurement process must complete and sign a Conflict of Interest Form.



## Appendix B



# THE CORPORATION OF THE CITY OF WATERLOO

By-Law No. ~~2019-026~~2025-0XX

**By-law to establish policies for the procurement of  
Goods and Services by the City**

~~June 24, 2019~~  
December 1, 2025

## Table of Contents

Section	Page Number
1. <del>PURPOSES, GOALS, AND OBJECTIVES .....</del>	<del>4</del>
2. <del>APPLICATION OF BY-LAW .....</del>	<del>5</del>
3. <del>DEFINITIONS .....</del>	<del>6</del>
4. <del>INTERPRETATION .....</del>	<del>9</del>
5. <del>RESPONSIBILITIES AND AUTHORITY .....</del>	<del>9</del>
6. <del>PREScribed COUNCIL APPROVAL .....</del>	<del>10</del>
7. <del>PURCHASING APPROVALS .....</del>	<del>11</del>
8. <del>PROCUREMENT PROCESS .....</del>	<del>11</del>
9. <del>REQUIREMENT FOR APPROVED FUNDS.....</del>	<del>11</del>
10. <del>STANDARD PROCUREMENT METHODS .....</del>	<del>11</del>
11. <del>ALTERNATE PROCUREMENT METHODS .....</del>	<del>14</del>
12. <del>NEGOTIATION .....</del>	<del>14</del>
13. <del>EMERGENCY PURCHASES.....</del>	<del>14</del>
14. <del>NON-COMPETITIVE PROCUREMENTS .....</del>	<del>15</del>
15. <del>CONTRACTOR PERFORMANCE MANAGEMENT .....</del>	<del>17</del>
16. <del>LOCAL OR GEOGRAPHICAL PREFERENCE.....</del>	<del>17</del>
17. <del>BID ADMINISTRATION .....</del>	<del>18</del>
18. <del>CO-OPERATIVE PURCHASING.....</del>	<del>19</del>
19. <del>IN-HOUSE WORK.....</del>	<del>19</del>
20. <del>CONSULTING SERVICES .....</del>	<del>19</del>
21. <del>ACCESS TO INFORMATION .....</del>	<del>20</del>
22. <del>SUSTAINABLE PROCUREMENT.....</del>	<del>20</del>
23. <del>DISPOSAL OF SURPLUS PROPERTY .....</del>	<del>20</del>
24. <del>TIE BIDS.....</del>	<del>21</del>
25. <del>SUPPLEMENTARY POLICIES .....</del>	<del>21</del>
26. <del>NO LOBBYING.....</del>	<del>21</del>
27. <del>DONATIONS .....</del>	<del>22</del>
28. <del>SHORT TITLE .....</del>	<del>22</del>
29. <del>REPEAL.....</del>	<del>22</del>
30. <del>ENACTMENT .....</del>	<del>22</del>
31. <del>SCHEDULE “A” .....</del>	<del>23</del>
32. <del>SCHEDULE “B” .....</del>	<del>25</del>
33. <del>SCHEDULE “C” .....</del>	<del>27</del>
1. <del>PURPOSES, GOALS, AND OBJECTIVES .....</del>	<del>4</del>
2. <del>APPLICATION OF BY-LAW .....</del>	<del>5</del>
3. <del>DEFINITIONS .....</del>	<del>6</del>
4. <del>INTERPRETATION .....</del>	<del>9</del>
5. <del>RESPONSIBILITIES AND AUTHORITY .....</del>	<del>10</del>
6. <del>CITY COUNCIL.....</del>	<del>12</del>
7. <del>PROCUREMENT PROCESS.....</del>	<del>13</del>
8. <del>CONTRACT MANAGEMENT AND ADMINISTRATION .....</del>	<del>28</del>
9. <del>CONTRACTOR PERFORMANCE MANAGEMENT .....</del>	<del>29</del>

<b>10.</b>	<b>RECORDS RETENTION AND ACCESS TO INFORMATION .....</b>	<b>29</b>
<b>11.</b>	<b>DISPOSAL OF SURPLUS PROPERTY .....</b>	<b>30</b>
<b>12.</b>	<b>DONATIONS .....</b>	<b>31</b>
<b>13.</b>	<b>SUPPLEMENTARY POLICIES .....</b>	<b>31</b>
<b>14.</b>	<b>SHORT TITLE .....</b>	<b>32</b>
<b>15.</b>	<b>REPEAL.....</b>	<b>32</b>
<b>16.</b>	<b>ENACTMENT .....</b>	<b>32</b>
<b>17.</b>	<b>SCHEDULE “A” .....</b>	<b>33</b>
<b>18.</b>	<b>SCHEDULE “B” .....</b>	<b>35</b>
<b>19.</b>	<b>SCHEDULE “C” .....</b>	<b>37</b>
<b>20.</b>	<b>SCHEDULE “D” .....</b>	<b>39</b>



# THE CORPORATION OF THE CITY OF WATERLOO

By-Law No. ~~2019~~2025-

## ~~By-law to establish policies for the procurement of Goods and Services by the City~~

### BY-LAW TO ESTABLISH POLICIES FOR THE PROCUREMENT OF GOODS AND SERVICES BY THE CITY

**WHEREAS** section 270(1)(3) of the *Municipal Act 2001*, S.O. 2001, c. 25, as amended (the "Act"), requires all municipalities to adopt and maintain a policy with respect to the procurement of Goods and Services;

**AND WHEREAS** The Corporation of the City of Waterloo (the "City") is committed to ensuring its procurement decisions are fair, ~~open~~, transparent and non-discriminatory;

**AND WHEREAS** effective planning, monitoring and control of procurement is essential for maintaining public trust and confidence;

**AND WHEREAS** purchases made by the City should reflect best value for the City, protect the City's financial interests and encourage competitive Bidding;

**AND WHEREAS** effective Contractor performance is critical for the success of City projects. Poor workmanship, unnecessary project delays and unsafe work practices will not be accepted.

**AND WHEREAS** the City should be prepared to manage extraordinary circumstances from time to time, and that such circumstances may require immediate procurement decisions that are necessary to prevent or alleviate serious delay, a threat to public health, safety or welfare, the disruption of essential services or damage to public property or to respond to an emergency or as required under the provincial *Emergency Management and Civil Protection Act*, R.S.O. 1990, c. E.9, as amended;

**AND WHEREAS** effective planning, monitoring and control of ~~Broader Public Sector~~the City's procurement activities is essential for maintaining public trust and confidence;

**NOW THEREFORE** the Council of The Corporation of the City of Waterloo enacts as follows:

#### 1. PURPOSES, GOALS, AND OBJECTIVES

- 1.1 The purposes, goals, and objectives of this by-law and of each of the methods of procurement authorized herein are:
  - 1.1.1 To establish standard rules governing the procurement of Goods and Services by City staff;
  - 1.1.2 To obtain the best value for the City when procuring Goods and Services;
  - 1.1.3 To ensure consistency and fairness amongst Bidders during the procurement process;
  - 1.1.4 To the extent possible, ensure openness, accountability and transparency while protecting the financial best interests of the City;
  - 1.1.5 To avoid conflicts between the interests of the City and those of the City's employees and members of Council;
  - 1.1.6 To specify roles and responsibilities of individuals, Divisions and Departments through the procurement process;
  - 1.1.7 To promote respect for human rights, international and inter-provincial trade treaties or agreements and fair labour practices;
  - 1.1.8 To encourage, whenever possible, the procurement of Goods and Services with due regard to the conservation of a natural environment, and that adopt a pro-active approach to climate change;
  - 1.1.9 To promote and incorporate the requirements of the *Accessibility for Ontarians with Disabilities Act, 2005*, S.O. 2005, c. 11, as amended (the "AODA") in procurement activities of the City as well as any requirements contained in other legislation (either provincial or federal) which may impact the procurement activities of the City;
  - 1.1.10 To support effective business planning such that Goods and Services will only be acquired after consideration of need, alternatives, timing and appropriate life cycle management issues;
  - 1.1.11 To mitigate risk in future contracts through monitoring, measuring and recording Contractor performance, ~~and,~~
  - 1.1.12 To comply with the requirements of the Act, ~~and~~
  - ~~1.1.12~~ 1.1.13 To support, whenever possible, Canadian Businesses by providing greater access to procurement opportunities.

## 2. APPLICATION OF BY-LAW

- 2.1 This by-law shall apply to purchases by staff in all Departments of the City, including Committees of the City with designated budgets who must coordinate with City staff to facilitate any purchase of Goods or Services.
  - 2.1.1 Notwithstanding section 2.1, this by-law shall not apply:
    - 2.1.1.1 to the purchase of those Goods and Services set out in **Schedule "A"**; and

2.1.1.2 subject to Section ~~497.3.6~~, where the City is engaged in Co-operative Purchasing and where another municipality, government agency or member of the Broader Public Sector is purchasing Goods and Services on the City's behalf.

2.2 All ~~purchases~~City of Goods~~Waterloo elected officials~~ and ~~Services~~staff shall ~~be compliant with this by-law~~comply with the Purchasing By-law for the City of Waterloo. Without limiting the foregoing, such elected officials and staff comply with the City's Employee Code of Conduct and Purchasing Statement of Ethics Policy attached as Schedule D to this by-law.

2.3 No contract for Goods and Services shall be structured in such a manner so as to circumvent any intent or thresholds of this by-law.

~~2.4 No purchase shall be processed for personal items of direct benefit to employees of the City or any member of Council except where permitted by this by-law, City policy or under the auspices of a City-sponsored employee program.~~

~~2.5 No Goods or Services shall be purchased from an employee of the City, except where permitted under this by-law.~~

### 3. DEFINITIONS

3.1 In this by-law:

3.1.1 ~~“Authority Limit” means the maximum monetary value delegated to specific staff positions or Council;~~

3.1.2 “Bid” includes a Bid, proposal, quotation and tender;

3.1.3 “Bid Bond” means a written guaranty from a third party guarantor submitted to a principal (client or customer) by a Contractor (Bidder) along with a Bid which insures against non-performance of the Bid document's requirements on the acceptance of a Bid;

3.1.4 “Bid Irregularity” means a deviation from the requirements of a call for Bid;

3.1.5 “Bidder” means one who submits a response to ~~a call for Bid and includes those submitting a response to a call for proposal, quotation or tender~~any call for a Low Cost Purchase, Competitive or Non-Competitive procurement;

~~3.1.6 “Change Order” means a change to an authorized commitment with a corresponding change in value of a contract or Purchase Order, documented through a change order, contract amendment or similar document.~~

3.1.6 “Canadian Business” means a supplier, manufacturer or distributor of any business structure that conducts its activities on a permanent basis in Canada. The business either:

i. has its headquarters or main office in any province or territory within Canada, or

ii. has at least 250 full-time employees in any one province or territory within Canada at the time of the applicable procurement process;

3.1.7 “Chief Administrative Officer” or “CAO” means the Chief Administrative Officer of the City or his or her designate;

- 3.1.8 “Chief Financial Officer” or “CFO” means the Chief Financial Officer and Treasurer of the City or his or her designate;
- 3.1.9 “City Solicitor” means the Director of Legal Services, or his or her designate, or outside legal counsel as determined by the Director of Legal Services from time to time;
- 3.1.10 “City” means The Corporation of the City of Waterloo;
- 3.1.11 “Commissioner” means a person with administrative responsibilities for a Department of the City, or his or her designate;
- 3.1.12 “Commitment Approval” means the authorization to use approved budgeted funds up to an allowable Authority Limit but does not include the authority to sign any contract, except where permitted by ~~an Execution~~ the By-Law To Delegate Authority to Execute Documents or other City ~~policy~~ policies;
- 3.1.13 “Contractor” means a person or firm having a contract with the City to furnish Goods and/or Services;
- 3.1.14 “Construction” means a service that has as its objective the realization by whatever means of civil or building works, based on Division 51 of the United ~~National Nations~~ Provisional Central Product Classification. For clarity, Construction does not include Consulting Services relating to construction;
- 3.1.15 “Consultant” means a person or firm that provides Consulting Services;
- 3.1.16 “Consulting Services” means the provision of expertise or strategic advice that is presented for consideration and decision-making;
- 3.1.17 “Co-operative Purchasing” means a procurement method where the process ~~City of Waterloo leverages existing contracts established by which one~~ other public body ~~sector entities or buying-group purchasing organizations creating contracts on behalf of one~~ municipalities, publicly funded or more public bodies undertake a procurement process in order to obtain the benefits of volume purchases and administrative efficiency; ~~sector entities;~~
- 3.1.17 ~~3.1.18~~ “Corporate Management Team” or “CMT” means the group consisting of the CAO and the Commissioners of all Departments ~~which, for greater certainty, includes the CFO;~~
- 3.1.18 ~~3.1.19~~ “Council” means the Council of the City;
- 3.1.20 “Covered Procurement” means procurement for governmental purposes for which the value equals or exceeds the relevant thresholds set out in the in the Canadian Free Trade Agreement or the Canada-European Union Comprehensive Economic and Trade Agreement or any other trade treaty the City may be subject to;
- 3.1.19 ~~3.1.21~~ “Department” means a collection of Divisions under the control of a Commissioner of the City;
- 3.1.20 ~~3.1.22~~ “Director” means a Director ~~Deputy Commissioner, Senior Director, Executive Director, Director, the City Solicitor,~~ the City Clerk or a Deputy Fire Chief of the City, or his or her designate, who is responsible for a specific Division;

3.1.243.1.23 “Director of Procurement” means the Director of Fleet and Procurement of the City, or his or her designate, who is under the general direction of the ~~Chief Financial Officer~~Commissioner of Corporate Services;

3.1.223.1.24 “Division” means a part of a Department of the City;

3.1.233.1.25 “Donation” means a cash and/or in-kind contribution made to the City with no reciprocal commercial benefit expected or required from the City. Donations do not involve a business relationship and are distinct from sponsorship and/or advertising initiatives;

3.1.243.1.26 “Emergency” means a situation or threat or an impending situation which may affect the environment, life, safety, health or welfare of the general public or the property of the residents of the City that requires immediate repair or replacement of equipment, services, or facilities in order to prevent or mitigate the loss or impairment of life, health, essential services or property within the City-;

3.1.27 “Estimated Purchase Value” means the factor that determines the allowable procurement method. In determining the Estimated Purchase Value consideration must be given to the total value of the procurement over its entire duration, whether awarded to one or more suppliers, taking into account all forms of remuneration, including (i) premiums, fees, commissions and interest; and (ii) the total value of renewals if the procurement provides for the possibility of renewals; (iii) the value of any contingent payments (e.g. cash allowances), excluding sales taxes;

3.1.253.1.28 “Goods” means personal property (including the costs of installing, operating, maintaining or manufacturing such personal property) and includes raw materials, products, equipment and other physical objects of every kind and description whether in solid, liquid, gaseous or electronic form, unless they are procured as part of a general construction contract;

3.1.263.1.29 “Goods and Services” “Goods or Services” means all Goods and/or services including Construction Services and Consulting Services;

3.1.273.1.30 “In-House Work” is where the provision of Goods and/or Services will be completed entirely by City staff;

3.1.283.1.31 “Limited Procurement” means a competitive or non-competitive procurement method where one or more suppliers of the City’s choice are invited to Bid-;

3.1.293.1.32 “Manager” means a Manager or his or her designate, who is responsible for a specific Section;

3.1.303.1.33 “Multi-Use List” means a list of Contractors that the City has determined satisfy the conditions for participation in that list, and that the City intends to use more than once;

3.1.343.1.34 “Non-Competitive Procurement” means a purchase negotiated directly from one supplier or a purchase made using a Limited Procurement method when an Open Competitive Procurement method is required in accordance with Schedule “C” of this by-law;

3.1.323.1.35 “Open Competitive Procurement,” means a competitive solicitation method, where a notice of intended procurement is advertised to the public, giving all suppliers an equal opportunity to submit a Bid in response to the solicitation-;



~~3.1.33~~3.1.36 “Prequalified Contractor~~”~~” means a Contractor who has submitted a response to an advertised request for prequalification and has been determined to have met the minimum disclosed criteria and standards for technical qualifications and professional competence, and has the necessary equipment, facilities and experience for specific future solicitations;

~~3.1.34~~3.1.37 “Purchasing Card” means a card provided by the City to duly authorized City staff to make purchases in compliance with the Purchasing Card Policy;

~~3.1.35~~3.1.38 “Procurement Division” means the ~~division~~Section of the City managed by the Director of Procurement”;

~~3.1.36~~3.1.39 “Purchase Order” means a contractual agreement with a Contractor that specifies payment terms, delivery dates, item identification, quantities, freight terms and all other obligations and conditions;

~~3.1.37~~3.1.40 “Section” means a part of a Division of the City;

~~3.1.38~~3.1.41 “Standing Arrangement” means an arrangement developed by the City or under which the City participated in, with a Contractor or Contractors under which the City may purchase Goods and/or Services from the Contractor(s) through a competitive or non-competitive procurement method over a period specified in the arrangement. The arrangement includes all terms applicable to the procurement, such as the cost of the Goods and Service and delivery requirements;

~~3.1.39~~3.1.42 “Surplus Property” means items no longer having a use to the City and shall include furniture, vehicles, equipment, supplies, and other Goods or materials, which are deemed surplus or which have become obsolete, worn out, or otherwise incapable of use.

- 3.2 To establish the definition of any other purchasing term not herein included, reference shall be made to the latest edition of the National Institute of Governmental Purchasing Inc. (NIGP) Public Procurement Dictionary of Terms.
- 3.3 All monetary amounts outlined in this by-law shall, unless otherwise stated, exclude all applicable taxes.
- 3.4 The monetary thresholds outlined in **Schedule “C”** shall be consistent with the City's estimated or budgeted amounts for the specific procurement or project, not the amount actually Bid.

#### 4. INTERPRETATION

- 4.1 Headings contained in this by-law are for reference only.
- 4.2 **Schedule “A” - Purchasing Exemptions** is incorporated into and forms a part of this by-law.
- 4.3 **Schedule “B” - Chart of Bid Irregularities or Non-Compliance** is incorporated into and forms a part of this by-law.
- 4.4 **Schedule “C” - Thresholds of Procurement Methods** is incorporated into and forms a part of this by-law.

4.5 Schedule "D" – Purchasing Statement Of Ethics is incorporated into and forms a part of this by-law.

## 5. RESPONSIBILITIES AND AUTHORITY

### 5.1 Director of Procurement – The Director of Procurement is responsible for:

- 5.1.1 Providing procurement advice and related services including the necessary forms, contracts and Bid document templates that may be required by Departments, the CAO and Council for the purposes of fulfilling the procurement needs of the City;
- 5.1.2 Facilitating all aspects of calls for Bids including opening and ensuring compliance with the terms and conditions of the call for Bid;
- 5.1.3 Ensuring compliance with this by-law and associated policies and procedures and reporting non-compliance, in writing, to the appropriate Director, Commissioner or CAO, where warranted;
- 5.1.4 Approve, in consultation with the ~~Director of Legal Services~~ City Solicitor, by-law exception requests made pursuant to section ~~457.3.5~~ herein;
- 5.1.5 The standardization of Goods and Services in conjunction with Divisions, where appropriate and feasible;
- 5.1.6 The consolidation of the procurement of all similar Goods and Services where appropriate and feasible;

~~5.1.75.1.1 Assisting Divisions with the disposal of Surplus Property;~~

~~5.1.85.1.7~~ Ensuring that there is City representation in respect of co-operative purchasing initiatives; and,

~~5.1.95.1.8~~ Complying with the purposes, goals, and objectives of this by-law.

## **5.2 Manager, Procurement – The Manager, Procurement is responsible for:**

- 5.2.1 ensuring the consistent application of this by-law and providing procurement services to City staff;
- 5.2.2 developing Procurement strategies and continually analyzing business requirements and spending patterns to identify opportunities for strategic sourcing;
- 5.2.3 researching, developing, maintaining, updating, and communicating procurement protocols, procedures, and templates;
- 5.2.4 addressing any issues or concerns that arise in respect of a procurement process and seeking guidance, support, and advice of the Director of Procurement or Legal Services, as required;
- 5.2.5 providing appropriate orientation, training, and tools to City staff involved in procurement activities; and
- 5.2.6 **Assisting Divisions with the disposal of Surplus Property;**

## **5.3 Procurement Division Employees - Procurement Division Employees are responsible for:**

- 5.3.1 complying with this by-law and ensuring this by-law and all protocols and procedures are applied consistently;
- 5.3.2 providing strategic support, consultation and procurement services to City staff;
- 5.3.3 communicating procurement protocols, procedures, and templates to City staff;
- 5.3.4 training City Staff on this by-law, protocols and forms; and
- 5.3.5 ensuring that all documentation relating to a procurement that is facilitated by the Procurement Division is properly filed and maintained in a procurement project file.

## **5-25.4 Commissioners, Directors and Managers – Commissioners, Directors and Managers are responsible for ensuring that:**

- 5-2-15.4.1 all procurement within their respective Departments or Divisions or Sections is in compliance with this by-law and any associated policies and procedures;
- 5-2-25.4.2 no procurement, except for Emergency purchases, shall be contrary to Council's approved budget or any specific direction from the CAO, CFO or Council, unless otherwise authorized by a Council-approved policy;
- 5-2-35.4.3 payments to Contractors are approved for processing within the times set out in the contract, provided the Contractor has met all the conditions of the contract; and,
- 5-2-45.4.4 all Goods and Services contracted for have been received and accepted by the City and ~~maintain~~ appropriate documentation reflecting any approved changes in the terms and conditions of a contract is maintained.

## **5-35.5 City Solicitor – City Solicitor is responsible for:**

~~5.3.15.5.1~~ ~~Create~~Creating template contracts and updates as required;

~~5.3.25.5.2~~ ~~Prepare~~Preparing amendments to contracts;

~~5.3.35.5.3~~ ~~Prepare~~Preparing negotiated contracts for signature;

~~5.3.45.5.4~~ ~~Review~~Reviewing and ~~advise~~advising on interpretation of policies and legislation in relation to the Purchasing By-Law;

~~5.3.55.5.5~~ ~~Provide~~Providing legal advice and opinions as required in relation to legal issues arising during or as a result of purchasing activities;

~~5.3.65.5.6~~ ~~Review~~Reviewing and ~~provide~~providing legal advice and opinion regarding large, complex or unique purchases.

~~5.45.6~~ **CAO** – The CAO is responsible for ensuring ~~that all City staff complies with this by-law.;~~

~~5.6.1~~ ~~**PREScribed**~~that all City staff complies with this by-law.

## **6. CITY COUNCIL ~~APPROVAL~~**

6.1 The following contract awards shall be subject to Council approval:

6.1.1 any contract prescribed by statute to be made by Council;

6.1.2 any contract that includes third party financing as part of the acquisition of Goods and Services;

6.1.3 any contract where this by-law is being waived;

6.1.4 any contract where Council has expressly directed staff to report prior to an award;

6.1.5 any contract where authority to approve has not been expressly delegated;

6.1.6 any contract where a submission in response to a call for Bid contains an irregularity not resolved by **Schedule “B”** of this by-law and which was not able to be otherwise resolved by the Procurement Division; or,

6.1.7 any contract through a Non-Competitive Procurement process, except where permitted in Schedule C ~~and/or~~ Section ~~457.3.5~~ of this by-law.

6.2 Council may waive, by resolution, the application of any part of this by-law in respect of any given procurement.

## **~~7.~~ PURCHASING APPROVALS**

~~7.1 All Commitment Approvals and subsequent execution of contract documents, including contract changes resulting in increases in contract value must be approved in accordance with the City's By Law to Delegate Authority to Execute Documents.~~

## **8.7. PROCUREMENT PROCESS**

**8.7.1** Procurements shall be undertaken in compliance with the following requirements:

**8.1.47.1.1** each call for Bid shall be conducted in a fair, ~~open~~transparent, equitable, consistent, non-discriminatory and professional manner; and

**8.1.27.1.2** the call for Bid document shall be publicly advertised, where required, in accordance with Schedule “C” to maximize the response potential to the call for Bid.

## **7.2 PROCUREMENT PLANNING**

**7.2.1** Before a Bid can be posted, a comprehensive procurement plan must be developed with the Procurement Division that will consider, at a minimum:

**7.2.1.1** available budget;

**7.2.1.2** the procurement method;

**7.2.1.3** the total estimated cost including all options, as well as maintenance costs, as applicable;

**7.2.1.4** contract terms and conditions;

**7.2.1.5** the procurement schedule;

**7.2.1.6** evaluation procedures and method of selection; and

**7.2.1.7** contract management requirements.

**7.2.2** The requesting Division should, prior to initiating any procurement process for Goods and/or Services:

**7.2.2.1** Ensure that the Goods and/or Services are legitimately required for City purposes;

**7.2.2.2** Consider short and long-term requirements with respect to quantities and supply duration, or total project cost considering the life span of the program or project;

**7.2.2.3** Consider the cost of ongoing maintenance, support, and licensing, etc.;

**7.2.2.4** Confirm availability of funding;

**7.2.2.5** Allow sufficient time to complete the procurement process, in accordance with process timelines posted by the Procurement Division; and

**7.2.2.6** Prepare detailed specifications, statements of work and quantity requirements with the underlying premise of encouraging transparent and fair competition. Specifications must not be developed in a way that are prescriptive to specific branded products/services but instead descriptive of the performance requirements of the product/service needed.

### 8.1.37.2.3 REQUIREMENT FOR APPROVED FUNDS

8.1.3.17.2.3.1 The authority to procure Goods and Services or award a contract is subject to the identification and availability of funds in appropriate accounts within Council's approved budget.

8.1.3.27.2.3.2 All purchases which are outside the Council-approved budget shall be subject to the appropriate City budget policy.

### 7.2.4 ~~STANDARD SOCIAL AND SUSTAINABLE PROCUREMENT~~

7.2.4.1 All Departments, Divisions and Sections of the City are encouraged to consider the social and environmental impacts of their procurement of Goods and Services to balance fiscal responsibility with social and environmental values. The City's Social Procurement Policy shall be considered for the procurement of Goods and Services.

### 7.2.5 ESTIMATED PURCHASE VALUE

7.2.5.1 The Estimated Purchase Value is used to identify recommended procurement methods.

7.2.5.2 The value of a procurement must not be reduced in any attempt to avoid the application of other requirements of this By-Law, including requirements relating to procurement method.

7.2.5.3 Where similar Goods and/or Services are required in connection with one project, all of those Goods and/or Services, including all contemplated phases of the project, shall be included in determining the Estimated Purchase Value.

### 7.3 PROCUREMENT METHODS

7.3.1 Unless otherwise specified in this by-law, Goods and Services shall be purchased or procured in accordance with the methods described in this section and in accordance with Schedule "C" of this by-law.

### ~~8.26.1~~ PROCUREMENT METHODS

~~8.2.16.1.1~~ Unless otherwise specified in this by-law, Goods and Services shall be purchased or procured in accordance with the methods described in this section and in accordance with Schedule "C" of this by-law.

### ~~8.2.2~~ REQUEST FOR INFORMATION ("RFI")

~~8.2.2.1~~ A RFI may be used to determine the interest of the marketplace to provide Goods or Services, which the City is contemplating purchasing.

~~8.2.2.2~~ A RFI may be used as a general market research tool to determine what Goods and Services are available and if they meet the City's business or operational requirements or acquisition strategies.

~~8.2.2.3 A RFI may request publicly available commodity cost details for the purpose of budget planning or developing a future call for Bid.~~

~~8.2.2.4 A RFI should not create a contractual obligation between the City and the interested party.~~

~~8.2.3 **REQUEST FOR PREQUALIFICATION ("RFPQ")**~~

~~8.2.3.1 A submission in response to a RFPQ may be made a specific pre-condition of any other procurement procedure utilized by the City.~~

~~8.2.3.2 A RFPQ may be conducted for any Goods or Services to determine qualified Bidders for a potential subsequent procurement process.~~

~~8.2.3.3 A RFPQ should not create a contractual obligation between the City and the interested party.~~

~~8.2.3.4 A RFPQ shall be publicly advertised, as outlined in **Schedule "C"** of this by-law, in a manner determined by the Director of Procurement or as outlined in a supplementary policy.~~

~~8.2.3.5 A RFPQ that is used to create a Multi-Use List can only be valid for three (3) years or less without having to publish a new RFPQ.~~

~~8.2.3.6 Notwithstanding any other provision of this by-law, where there has been a RFPQ, no public advertising shall be required for a subsequent RFQ, RFT or RFP.~~

8.2.47.3.2 **LOW COST PURCHASE ("LCP")**

8.2.4.17.3.2.1 A LCP may be conducted for the procurement of Goods and Services having a purchase value up to the limit stated in Schedule "C" of this by-law.

8.2.4.27.3.2.2 A LCP may be made utilizing a purchase order, petty cash, a vendor offered charge account or ~~purchase~~Purchasing Card or other similar method.

8.2.4.37.3.2.3 A Manager or Director may authorize specific individuals to make LCPs and set monetary limits to that authority, in accordance Schedule "C" of this by-law.

~~8.2.5 **REQUEST FOR QUOTATION ("RFQ")**~~

~~7.3.3 A RFQ is an invitation~~**COMPETITIVE PROCUREMENT**

7.3.3.1 All Competitive Procurements must be Publicly Advertised. The methods for a price, based on requesting a Bid include, but are not limited to:

7.3.3.1.1 Request for Expression of Interest (REOI);

7.3.3.1.2 Request for Information (RFI);

7.3.3.1.3 Request for Prequalification (RFPQ);

7.3.3.1.4 Request for Proposal (RFP);

7.3.3.1.5 Request for Tender (RFT):

7.3.3.1.6 A multi-step process which may involve a combination of the terms above.

7.3.3.2 The Procurement Division Employee is responsible for determining the procurement method and description of Goods conducting and Services described in the RFQ. In managing the RFQ procurement process for all competitive procurements including the scope of work is well defined evaluation process and award is based on price only after all mandatory the maintenance of Bids, Bidder information and Bid results:

8.2.5.17.3.3.3 The project manager is responsible for determining the requirements have been met as defined in the RFQ and preparing detailed specifications or statements of work and quantity requirements on behalf of their Division:

8.2.5.2 A RFQ may be invitational or publicly advertised, as outlined in **Schedule “C”** of this by-law, in a manner determined by the Director of Procurement or as outlined in a supplementary policy.

8.2.6 **REQUEST FOR TENDER (“RFT”)**

8.2.6.1 A RFT is an invitation for a Bid, based on the terms, and description of Goods and Services described in the RFT. In the RFT the scope of work is well defined and award is based on price only after all mandatory requirements have been met as defined in the RFT. The RFT is used for more complex requirements than those used in the RFQ.

8.2.6.2 A RFT shall be invitational or publicly advertised as outlined in **Schedule “C”** of this by-law, in a manner determined by the Director of Procurement or as outlined in a supplementary policy.

8.2.7 **REQUEST FOR PROPOSAL (“RFP”)**

8.2.7.1 A RFP is an invitation to potential Contractors to submit a proposal for the purpose of an award. In the RFP the deliverables may not be well defined but represented by an end result/objective. Bidders are required to submit their approach to a general description of services outlining the objective expected. Pre-determined evaluation criterion is established and Bids are evaluated to determine a highest scoring Contractor based on the best-rated score from both technical criteria and price.

8.2.7.2 A RFP shall be invitational or publicly advertised, as outlined in **Schedule “C”** of this by-law, in a manner set out by the Director of Procurement or as outlined in a supplementary policy.

8.2.7.3 A RFP may be used in situations where any of the following apply:

8.2.7.3.1 the selection of the successful Bidder depends upon the effectiveness of the proposed solution based on several stated criteria outlined in the proposal;



~~8.2.7.3.2 — where negotiation with one or more Bidders may be required with respect to any aspect of the contract;~~

~~8.2.7.3.3 — the precise Goods or Services (or the applicable specifications) are unknown or are not definable; or,~~

~~8.2.7.3.4 — the services required are Consulting Services.~~

## **~~9. ALTERNATE PROCUREMENT METHODS~~**

### ~~9.1.16.1.1 UNSOLICITED SUBMISSIONS, PROPOSALS AND OFFERS~~

~~9.1.2 All unsolicited submissions, proposals and offers received by the City if being considered shall be directed to the Director of Procurement for review with the Director or Commissioner of the appropriate Division or Department for their review.~~

7.3.3.4 The Procurement Division Employee is responsible for reviewing the specifications or statements of work and quantity requirements, developing an appropriate Bid Request and evaluation method and criteria ensuring that the principles outlined in Section 7 are followed;

7.3.3.5 Following Bid review and/or evaluation and determination of the recommended Bidder(s), approval to Award the Contract(s) is required in accordance with this by-law.

### 9.1.37.3.4 NEGOTIATION

~~9.1.3.17.3.4.1~~ Negotiation, conducted under the direction of the Director of Procurement and/or the Procurement Division, may be used for the procurement of Goods and Services or for any contract when one or more of the following criteria apply:

~~9.1.3.1.17.3.4.1.1~~ due to abnormal market conditions, the Goods and Services required are in short supply or market price fluctuations or instability exists;

~~9.1.3.1.27.3.4.1.2~~ where only one Bid is received and it exceeds the amount budgeted for the procurement;

~~9.1.3.1.37.3.4.1.3~~ where extending the existing contract was provided for in the original Bid document;

~~9.1.3.1.47.3.4.1.4~~ where a Bid document expressly allow for negotiations to occur;

~~9.1.3.1.57.3.4.1.5~~ where extraordinary circumstances exist, as determined by the Director of Procurement;

~~9.1.3.1.67.3.4.1.6~~ where Council has authorized negotiation; or,

~~9.1.3.1.77.3.4.1.7~~ where all submitted Bids are non-compliant with the terms of the call for Bid.

### ~~9.1.46.1.1 EMERGENCY PURCHASES~~

~~9.1.4.16.1.1.1 Notwithstanding any of the provisions of this by-law, Goods and Services may be immediately purchased during an Emergency, as determined by any of the CAO, CFO, the Director of Procurement, or a Commissioner, which includes a circumstance where there is a threat to any of the following:~~

~~9.1.4.1.16.1.1.1.1 public health;~~

~~9.1.4.1.26.1.1.1.1 the maintenance of essential services or to prevent the disruption of essential services;~~

~~9.1.4.1.36.1.1.1.1 the welfare of persons or of public property; or,~~

~~9.1.4.1.46.1.1.1.1 the security of the City's interests.~~

~~9.1.4.26.1.1.1 Notwithstanding any of the provisions of this by-law, any of the CAO, CFO, the Director of Procurement, or a Commissioner, shall have the necessary authority to secure any Goods and Services required, in an efficient, expeditious manner for all Emergency purchases using a Purchasing Card or Purchase Order. In the case of an after hours emergency, a Purchase Order will be issued the next regular business day.~~

~~9.1.4.36.1.1.1 If the value of the Emergency purchase exceeds the value permitting Limited Procurements as outlined in Schedule "C", as soon as is practicable after an emergency purchase has been made, the appropriate Director or Commissioner shall forward a report to Council outlining:~~

~~9.1.4.3.16.1.1.1.1 the nature of the Emergency;~~

~~9.1.4.3.26.1.1.1.1 why the Emergency purchase was necessary;~~

~~9.1.4.3.36.1.1.1.1 the method by which the Emergency purchase was conducted; and,~~

~~9.1.4.3.46.1.1.1.1 the total cost of the Emergency purchase, including any budgetary impacts.~~

#### 9.1.57.3.5 NON-COMPETITIVE PROCUREMENTS

~~9.1.5.17.3.5.1~~ Unless allowable pursuant to **Schedule "C"** of this by-law, a ~~Director may only facilitate and negotiate a~~ Non-Competitive Procurement ~~may only be facilitated and negotiated,~~ if:

~~9.1.5.1.17.3.5.1.1~~ The circumstances for the Non-Competitive Procurement meet one of the allowable exceptions in ~~447.3.5.2~~ below or as may be permitted under ~~Article 513~~ of the Canadian Free Trade Agreement;

~~9.1.5.1.27.3.5.1.2~~ A rationale of how the request represents an allowable exception has been ~~approved by the Director of Procurement, in consultation with the Director of Legal Services, or if a request for an escalation is made, approved by the Corporate Management Team; and either:~~

~~i. approved by the Director of Procurement, in consultation with the City Solicitor.~~

ii. or if the request is denied by the Director of Procurement, approved by the Corporate Management Team, in consultation with the Director of Procurement and the City Solicitor.

7.3.5.1.3 Proper approvals in accordance with Authority Limits have been obtained; and

9.1.5.1.37.3.5.1.4 The Estimated Purchase Value is below the thresholds for a Covered Procurement and approval has been provided by the Director of Procurement.

9.1.5.27.3.5.2 Non-Competitive Procurements are permitted for Goods or Services of any contract value without the competitive Bid process in the following circumstances (allowable exceptions):

9.1.5.2.17.3.5.2.1 No compliant Bids were submitted or no Bidders responded to or met conditions for participation under a Bid or request for pre-qualification, or submitted Bids were collusive;

9.1.5.2.27.3.5.2.2 If the Goods and/or Services can be supplied only by a particular supplier and no reasonable alternative or substitute Goods or Services exist for any of the following reasons:

- i. the requirement is for a work of art;
- ii. the protection of patents, copyrights, or other exclusive rights;
- iii. due to an absence of competition for technical reasons;
- iv. the Supply of goods or services is controlled by a supplier that is a statutory monopoly;
- v. to ensure compatibility with existing Goods, or to maintain specialized goods that must be maintained by the manufacturer of those Goods or its representative;
- vi. work is to be performed on property by a contractor according to provisions of a warranty or guarantee held in respect of the property or the original work; or
- vii. work is to be performed on a leased building or related property, or portions thereof that may be performed only by the lessor.

9.1.5.2.37.3.5.2.3 For additional deliveries by the original supplier of Goods and/or Services that were not included in the initial procurement, if a change of supplier for such additional Goods or Services:

- i. cannot be made for economic or technical reasons such as requirements of interchangeability or interoperability with existing equipment, software, services, or installations procured under the initial procurement; and
- ii. would cause significant inconvenience or substantial duplication of costs for the City;

~~9.1.5.2.4~~7.3.5.2.4 If strictly necessary, and for reasons of urgency brought about by events unforeseeable by the City, the Goods or Services could not be obtained in time using an open Bid process;

~~9.1.5.2.5~~7.3.5.2.5 For the purchase of Goods on a commodity market;

~~9.1.5.2.6~~7.3.5.2.6 If the City procures a prototype or a first good or service that is developed in the course of, and for, a particular contract for research, experiment, study, or original development. Original development of a first Good or Service may include limited production or supply in order to incorporate the results of field testing and to demonstrate that the Good or Service is suitable for production or supply in quantity to acceptable quality standards, but does not include quantity production or supply to establish commercial viability or to recover research and development costs;

~~9.1.5.2.7~~7.3.5.2.7 If a contract is awarded to the winner of a design contest, provided that:

- i. The contest has been organized in a manner that is consistent with the advertising requirements set out in Schedule A; and
- ii. The participants are judged by an independent jury with a view to a design contract being awarded to a winner.

~~9.1.5.2.8~~7.3.5.2.8 For the purchase of Goods under exceptionally advantageous circumstances such as liquidation, bankruptcy or receivership, but not for routine purchases from regular Contractors;

~~9.1.5.2.9~~7.3.5.2.9 For procurements that target poverty reduction for disadvantaged natural persons if the value of the procurement is below \$200,000; or

~~9.1.5.2.10~~7.3.5.2.10 If Goods or Services regarding matters of a confidential or privileged nature are to be purchased and the disclosure of those matters through an open tendering process could reasonably be expected to compromise government confidentiality, result in the waiver of privilege, cause economic disruption or otherwise be contrary to the public interest.

#### ~~10.6. CONTRACTOR PERFORMANCE MANAGEMENT~~

~~10.16.1 The City may, for any contract created pursuant to this By-law, undertake performance evaluation during or after completion of the contract.~~

~~10.26.1 Documented performance on any City Contract may:~~

~~10.2.16.1.1 Determine the eligibility of a Contractor or Consultant to continue to provide Goods, Services or Consulting Services to the City;~~

~~10.2.26.1.1 Determine the eligibility of a Contractor or Consultant to participate in future Bid opportunities;~~

~~10.2.36.1.1 Be considered as part of the evaluation criteria for any future Bid opportunities.~~

~~10.36.1 Performance evaluations and corrective actions will be conducted in an appropriate and consistent manner, in accordance with the City's Supplier Performance Evaluation Program (the "Program").~~

~~10.4 — The Director Procurement is responsible:~~

~~10.4.16.1.1 for the implementation and oversight of the Program, including placing any Contractor or Consultant on probation as permitted under the Program;~~

~~10.4.26.1.1 for maintaining a list of Contractors or Consultants status under the Program;~~

~~10.4.36.1.1 to ensure that all Bidders have access to the Program and performance evaluation criteria; and~~

~~10.4.46.1.1 to ensure reference to the Program is detailed in all Bids that are subject to the Program.~~

~~10.56.1 Prior to issuing a formal notice of suspension as permitted under the Program, the Director of Procurement will consult with the City Solicitor.~~

~~10.66.1 Commissioners, Directors and Managers are responsible to ensure that their Departments, Divisions and Sections monitor and document a Contractor's performance and comply with their obligations under and the requirements of the Program.~~

#### ~~10.6.16.1.1 LOCAL OR GEOGRAPHICAL PREFERENCE~~

~~10.6.1.16.1.1.1 The City shall comply with the Discriminatory Business Practices Act, R.S.O. 1990, c. D.12, as amended.~~

#### ~~10.7.16.1 BID ADMINISTRATION~~

##### ~~10.7.16.1.1 BID IRREGULARITIES~~

~~10.7.1.16.1.1.1 Where a Bid is received that includes an irregularity, the City shall follow the protocol as appropriate for the particular irregularity, as outlined in Schedule "B".~~

##### ~~10.7.26.1.1 ONLY ONE BID RECEIVED~~

~~10.7.2.16.1.1.1 In the event only one Bid is received in response to a competitive Bid, the Director of Procurement may return the unopened Bid to the Bidder. In returning the unopened Bid, the Director of Procurement shall inform the Bidder that the City may be re-issuing the competitive Bid at a later date.~~

~~10.7.2.26.1.1.1 In the event that only one Bid is received in response to a request for competitive Bid, the Bid may be opened and evaluated.~~

~~10.7.2.36.1.1.1 If the Bid does not exceed the amount budgeted, it may be awarded in accordance with this by law.~~

~~10.7.2.46.1.1.1 Where the Bid exceeds the amount budgeted for the procurement, negotiations may be conducted with the only Bidder, in accordance with this by law.~~

##### ~~10.7.36.1.1 EXCLUSION OF BIDDERS~~

~~10.7.3.16.1.1.1 If there is supporting evidence, the City may exclude all Bids submitted by a Bidder on grounds such as:~~

~~10.7.3.2 that Bidder is engaged in a legal action or there is a potential of legal action with the City unless waived by the Director of Legal Services;~~

~~10.7.3.3 bankruptcy or insolvency;~~

~~10.7.3.3.16.1.1.1.1 false declarations;~~

~~10.7.3.3.26.1.1.1.1 significant or persistent deficiencies in performance of any substantive requirement or obligation under a prior contract or contracts;~~

~~10.7.3.3.36.1.1.1.1 final judgments in respect of serious crimes or other serious offences;~~

~~10.7.3.4 professional misconduct or acts or omissions that adversely reflect on the commercial integrity of the Bidder; and~~

~~10.7.3.5 failure to pay taxes.~~

#### 10.7.47.3.6 CO-OPERATIVE PURCHASING

10.7.4.17.3.6.1 The City may participate with other government agencies or members of the Broader Public Sector in co-operative purchasing initiatives where it is in the best interests of the City to do so.

10.7.4.27.3.6.2 The purchasing policies of the originating co-operative (or lead agency) shall form the basis of accepted policy and procedure when participating in, or calling, co-operative Bids and this by-law shall be otherwise waived. The City will review the originating co-operatives' purchasing policies before entering a co-operative purchasing arrangement.

#### 7.3.7 UNSOLICITED SUBMISSIONS, PROPOSALS AND OFFERS

7.3.7.1 All unsolicited submissions, proposals and offers received by the City if being considered shall be directed to the Director of Procurement for review with the Director or Commissioner of the appropriate Division or Department for their review.

7.3.7.2 If it is determined that there is a legitimate need for the Goods and/or Services offered by way of an unsolicited proposal, then a procurement process shall be conducted in accordance with this By-law.

#### 7.3.8 EMERGENCY PURCHASES

7.3.8.1 Notwithstanding any of the provisions of this by-law, Goods and Services may be immediately purchased during an Emergency, as determined by any of the CAO, CFO, the Director of Procurement, or a Commissioner, which includes a circumstance where there is a threat to any of the following:

7.3.8.1.1 public health;

7.3.8.1.2 the maintenance of essential services or to prevent the disruption of essential services;

7.3.8.1.3 the welfare of persons or of public property; or,

7.3.8.1.4 the security of the City's interests.

7.3.8.2 Notwithstanding any of the provisions of this by-law, any of the CAO, CFO, the Director of Procurement, or a Commissioner, shall have the necessary authority to secure any Goods and Services required, in an efficient, expeditious manner for all Emergency purchases using a Purchasing Card or Purchase Order. In the case of an after-hours emergency, a Purchase Order will be issued the next regular business day.

7.3.8.3 If the value of the Emergency purchase exceeds the value permitting Limited Procurements as outlined in Schedule "C", as soon as is practicable after an emergency purchase has been made, the appropriate Director or Commissioner shall forward a report to Council outlining:



7.3.8.3.1 the nature of the Emergency;

7.3.8.3.2 why the Emergency purchase was necessary;

7.3.8.3.3 the method by which the Emergency purchase was conducted; and,

7.3.8.3.4 the total cost of the Emergency purchase, including any budgetary impacts.

#### 10.7.57.3.9 IN-HOUSE WORK

10.7.5.17.3.9.1 For any studies, assessments, evaluations, renovations, surveys, construction and any other work involving City-owned lands, infrastructure and facilities the City reserves the right, to conduct such activities using its own staff and resources.

### 7.4 BID ADMINISTRATION

#### 10.7.67.4.1 CONSULTING SERVICES

#### ~~10.8~~ GENERAL

~~10.8.1.17.4.1.1~~ Consulting Services over one hundred ~~and twenty five~~ thousand dollars (~~\$100~~125,000) shall be procured by RFP, Multi-Use List ~~or,~~ Standing Arrangement, or Co-operative Purchasing Arrangement, unless a Non-Competitive Procurement process is permitted under Schedule "C" Threshold of Procurement Methods or is approved in accordance with Section ~~447.3.5~~.

~~10.8.1.27.4.1.2~~ When evaluating a RFP for consulting services ~~over one hundred thousand dollars (\$100,000)~~required under 7.4.1.1, the criteria of "price" shall be scored at least thirty five percent (35%), unless the criteria of price is negotiated in accordance with Section ~~437.3.4~~.1.4.

~~10.8.1.37.4.1.3~~ Notwithstanding Section ~~207.4~~.1.2, the City may include as part of its evaluation criteria the requirement that a Bidder meet a defined minimum technical score in order to have its Bid considered.

~~10.8.1.47.4.1.4~~ Consultants may be hired in, but not limited to, any the following circumstances:

~~10.8.1.4.17.4.1.4.1~~ the project requires special knowledge, skills, expertise, experience or available resources which the City does not possess in-house;

~~10.8.1.4.27.4.1.4.2~~ another organization is partially or wholly funding the project and strict timelines have been placed on the funding; or,

~~10.8.1.4.37.4.1.4.3~~ the nature of the project is such that it would not be in the public or City's interest to perform it in-house, as determined by the appropriate Director, in consultation with the ~~CFO and the~~ Director of Procurement.

~~10.8.1.5~~ 7.4.1.5 Under this section, all Consultant proposals procured by RFP shall include, at a minimum:

~~10.8.1.5.1~~ 7.4.1.5.1 a methodology and timetable to complete the project;

~~10.8.1.5.2~~ 7.4.1.5.2 demonstrated experience and qualifications required to perform the project; and,

~~10.8.1.5.3~~ 7.4.1.5.3 a list of personnel who will be directly involved in the completion of the project.

~~10.8.1.6~~ 7.4.1.6 Proposals for Consulting Services shall be evaluated by a panel consisting of at least three (3) people, including a minimum of two (2) City staff members familiar with the project or the Services being acquired.

~~10.8.1.7~~ 7.4.1.7 All of the members of the evaluation panel described in section ~~207.4~~ 7.4.1.6 of this by-law must participate in the evaluation process and score the proposal.

~~10.8.1.8~~ 7.4.1.8 The liaison Councillor may be invited to join the evaluation panel described in section ~~207.4~~ 7.4.1.6 of this by-law but, if invited, the liaison Councillor shall comply with section ~~207.4~~ 7.4.1.7 of this by-law.

#### 7.4.2 BID IRREGULARITIES

7.4.2.1 Where a Bid is received that includes an irregularity, the City shall follow the protocol as appropriate for the particular irregularity, as outlined in Schedule "B".

#### 7.4.3 ONLY ONE BID RECEIVED

7.4.3.1 In the event only one Bid is received in response to a competitive Bid, the Director of Procurement may return the unopened Bid to the Bidder. In returning the unopened Bid, the Director of Procurement shall inform the Bidder that the City may be re-issuing the competitive Bid at a later date.

7.4.3.2 In the event that only one Bid is received in response to a request for competitive Bid, the Bid may be opened and evaluated.

7.4.3.3 If the Bid does not exceed the amount budgeted, it may be awarded in accordance with this by-law.

7.4.3.4 Where the Bid exceeds the amount budgeted for the procurement, negotiations may be conducted with the only Bidder, in accordance with this by-law.

#### 7.4.4 EXCLUSION OF BIDDERS

7.4.4.1 If there is supporting evidence, the City may exclude all Bids submitted by a Bidder on grounds such as:

## **11. ACCESS TO INFORMATION**

- 7.4.4.1.1 ~~Disclosure of~~that Bidder is engaged in a legal action or there is a potential of legal action with the City unless waived by the City Solicitor;
- 7.4.4.1.2 bankruptcy or insolvency under the Bankruptcy and Insolvency Act, RSC 1985, C B-3 (BIA), or any application or assignment under the BIA or the Companies' Creditors Arrangement Act, RSC 1985, c C-36;
- 7.4.4.1.3 false declarations;
- 7.4.4.1.4 significant or persistent deficiencies in performance of any substantive requirement or obligation under a prior contract or contracts;
- 7.4.4.1.5 final judgments in respect of serious crimes or other serious offences;
- 7.4.4.1.6 professional misconduct or acts or omissions that adversely reflect on the commercial integrity of the Bidder; ~~information provided~~
- 7.4.4.1.7 failure to pay taxes; and
- 7.4.4.1.8 compliance with Provincial and/or Federal government directives for procurements.

#### 7.4.5 NO LOBBYING

- 7.4.5.1 Unless authorized by the City to do so, no Bidder shall contact any member of Council or any City staff person to attempt to influence the award of a contract.
- 7.4.5.2 If a Bidder contacts any member of Council or any City staff person to attempt to influence the award of a contract, the Bidder shall be disqualified, unless the Bidder's actions have been authorized by the City. ~~the City via a~~

#### 7.4.6 EVALUATION

- 7.4.6.1 Evaluation criteria must be clearly disclosed in the procurement documents.
- 7.4.6.2 Evaluation criteria must not be developed in a way that create hidden evaluation criteria.
- 7.4.6.3 All participants in the evaluation process must be trained on the particulars of that specific evaluation process, including their role, responsibilities and obligations during the evaluation process. Individuals who have not been trained on the evaluation process or have not complied with the City's evaluation procedures will not be eligible to evaluate bids for that procurement and will not be permitted to participate in that procurement's evaluation process.

#### 7.4.7 TIE BIDS

In the event that two (2) or more compliant, equal Bids are submitted during a competitive Bid process, the City shall determine the successful Bidder by drawing a Bidder's name from a receptacle or by flipping a coin, as determined by the Director of Procurement.

#### 7.4.8 LOCAL OR GEOGRAPHICAL PREFERENCE

7.4.8.1 The City shall comply with the *Discriminatory Business Practices Act*, R.S.O. 1990, c. D.12, as amended.

7.4.8.2 ~~shall~~ Notwithstanding section 7.4.8.1 the City may when trade agreements allow, limit its tendering to Canadian goods, services, or suppliers or as part of its evaluation criteria accord a preference for Canadian value-add.

#### 7.4.9 PURCHASING APPROVALS

7.4.9.1 All Commitment Approvals and subsequent execution of contract documents, including contract changes resulting in increases in contract value must be approved in accordance with the City's By-Law to Delegate Authority to Execute Documents or other City policies.

#### 7.4.10 BIDDER DEBRIEFINGS

7.4.10.1 Where the City has conducted a competitive procurement process, unsuccessful Bidders may request a debriefing. Debriefings must be managed and responded to in accordance with the City's Debriefing Protocol.

#### 7.4.11 PROCUREMENT PROTESTS

7.4.11.1 Suppliers may formally protest the outcome of a procurement process. Formal protests must be made by Bidders and must be managed and responded to by the City in accordance with the City's Procurement Protest Protocol.

### 8. CONTRACT MANAGEMENT AND ADMINISTRATION

8.1 All contracts must be managed by the respective City staff in accordance with this By-law and all applicable procedures and protocols to ensure that both the City and the supplier fulfil the requirements of the contract. City staff must involve the Procurement Division and Legal Services in the management of contract disputes, as required by applicable procedures and protocols.

8.2 When managing contracts, attention should be paid to ensure that:

8.2.1 payments are in accordance with the provisions of the *Contract*;

8.2.2 performance is managed and documented, and any performance issues are addressed as per Section 9 of this by-law

8.2.3 procurement documents, including the contract, identify the framework under which price increases will be permitted including, but not limited to, the frequency of price increases, allowable amount of increase, and any benchmarks (including inflation indices) that will be used to confirm the price increase.

## **9. CONTRACTOR PERFORMANCE MANAGEMENT**

9.1 The City may, for any contract created pursuant to this By-law, undertake performance evaluation during or after completion of the contract.

9.2 Documented performance on any City Contract may:

9.2.1 Determine the eligibility of a Contractor or Consultant to continue to provide Goods, Services or Consulting Services to the City;

9.2.2 Determine the eligibility of a Contractor or Consultant to participate in future Bid opportunities;

9.2.3 Be considered as part of the evaluation criteria for any future Bid opportunities.

9.3 Performance evaluations and corrective actions will be conducted in an appropriate and consistent manner, in accordance with the City's Supplier Performance Evaluation Program (the "Program").

9.4 The Director of Procurement is responsible:

9.4.1 for the implementation and oversight of the Program, including suspending or placing any Contractor or Consultant on probation as permitted under the Program;

9.4.2 for maintaining a list of Contractors or Consultants status under the Program;

9.4.3 to ensure that all Bidders have access to the Program and performance evaluation criteria; and

9.4.4 to ensure reference to the Program is detailed in all Bids that are subject to the Program.

9.5 Prior to issuing a formal notice of suspension as permitted under the Program, the Director of Procurement will consult with the City Solicitor.

9.6 Commissioners, Directors and Managers are responsible to ensure that their Departments, Divisions and Sections monitor and document a Contractor's performance and comply with their obligations under and the requirements of the Program.

## **10. RECORDS RETENTION AND ACCESS TO INFORMATION**

### **10.1 Records Retention**

10.1.1 All procurement records, including contracts, bids, supporting documentation, and related correspondence, are the property of the City and must be retained in accordance with the City's Retention By-Law 2013-071, as amended, and any applicable policies and procedures.

10.1.2 The official record of all contracts executed pursuant to this policy shall be retained in the City's designated electronic or physical records management system.

10.1.3 Procurement records required for reporting, auditing, or operational purposes must be maintained in a recoverable form in accordance with The City of Waterloo Records Classification and Retention Schedule established under By-Law 2013-071. Records shall not be destroyed except under the authority of By-Law 2013-071.

## 10.2 Access to Information

~~11.1.1~~10.2.1 The disclosure of procurement information must be made in accordance with applicable City's policies, procedures and protocols, in compliance with the Municipal Freedom of Information and Protection of Privacy Act, (MFIPPA), R.S.O. 1990, c. M.56, as amended, and the Personal Health Information Protection Act (PHIPA), 2004, S.O. 2004, c. 3, Sched. A, as amended, where applicable.

10.2.2 The disclosure of information relating to the issuance of competitive bids and/ or the award of contracts shall be made in accordance with MFIPPA, s. 4 by the City Clerk or their designate.

## 11. DISPOSAL OF SURPLUS PROPERTY

## ~~12. SUSTAINABLE PROCUREMENT~~

~~12.1 All Departments, Divisions and Sections of the City are encouraged to consider the social and environmental impacts of their procurement of Goods and Services to balance fiscal responsibility with social and environmental values.~~

## ~~13.6. DISPOSAL OF SURPLUS PROPERTY~~

~~13.1.1.1~~11.1 Any Surplus Property not required by ~~departments~~Division that has a residual value, as determined by the appropriate Director, shall be sold or disposed of in accordance with one of the following methods, as jointly determined by the Director of Procurement and the appropriate Director:

~~13.1.1.1.1~~11.1.1 Call for Bid: If it is determined by the Director of Procurement and the appropriate Director that the highest return for Surplus Property is by a call for Bid, a Bid shall be issued;

~~13.1.2~~11.1.2 Public auction: If it is determined by the Director of Procurement and the appropriate Director that the highest return for Surplus Property is by public auction, the Procurement Division shall arrange for the Surplus Property to be sold at a public auction;

~~13.1.3~~11.1.3 Return to supplier: If it is determined by the Director of Procurement and the appropriate Director that a higher return net of disposal cost can be achieved by sale or trade-in of the Surplus Property to the original supplier or suppliers in that line of business, the appropriate Director shall sell or trade in such Surplus Property at the highest return;

~~13.1.4~~11.1.4 In accordance with policy: If Council has established a policy in relation to the disposal of certain types of Surplus Property, then the provisions of that policy shall be followed by the Director of Procurement; or,

~~13.1.5~~11.1.5 The Division may notify community interest, non-profit organizations or other levels of government of the relevant items for disposal and, request they submit to the appropriate Director, a letter of interest.

~~13.211.2~~ Any Surplus Property not required by Departments and that has no residual value, as determined by the appropriate Director, shall be disposed of in accordance with one of the following methods, as determined by the Director of Procurement and appropriate Director:

~~13.2.411.2.1~~ The Division may notify a single community interest, non-profit organization or other levels of government of the relevant items for disposal and request they submit, to the appropriate Director, a letter of interest;

~~13.2.211.2.2~~ The Divisions may dispose of the items directly through the applicable waste process;

~~13.2.311.2.3~~ Public auction: the Procurement Division shall offer the Surplus Property for sale through a public auction.

~~13.311.3~~ No staff member or Councillor of the City shall personally obtain any Surplus Property with a value of more than \$~~50~~100.00 unless it is obtained through a public process.

~~13.3.411.3.1~~ Notwithstanding section ~~23~~11.3, a staff member or Councillor of the City may personally obtain Surplus Property at a price determined jointly by the Director of Procurement and the Director of Information Management & Technology Services, or his or her designate, without going through a public process if the property being obtained is information technology, such as a computer, laptop, or cell phone--.

## 12. DONATIONS

12.1 The City may accept Donations for Goods and Services, at Council's sole and absolute discretion.

### ~~13.3.26.1.1~~ TIE BIDS

~~In the event that two (2) or more compliant, equal Bids are submitted during a competitive Bid process, the City shall determine the successful Bidder by drawing a Bidder's name from a receptacle or by flipping a coin, as determined by the Director of Procurement.~~

## 14.13. SUPPLEMENTARY POLICIES

~~14.413.1~~ Council may prescribe supplementary policies, not inconsistent with this by-law, relating to the purchasing procedures or policies of the City, as Council deems necessary or expedient.

### ~~14.1.16.1.1~~ NO LOBBYING

~~14.1.1.16.1.1.1 Unless authorized by the City to do so, no Bidder shall contact any member of Council or any City staff person to attempt to influence the award of a contract.~~

~~14.2 If a Bidder contacts any member of Council or any City staff person to attempt to influence the award of a contract, the Bidder shall be disqualified, unless the Bidder's actions have been authorized by the City.~~

#### ~~15.6. DONATIONS~~

~~15.16.1 The City may accept Donations for Goods and Services, at Council's sole and absolute discretion.~~

#### ~~16.14. SHORT TITLE~~

~~16.14.1~~ The short title of this by-law shall be the "Purchasing By-Law".

#### ~~17.15. REPEAL~~

~~17.15.1~~ ~~29.1~~ By-Law ~~2015-071~~2019-026 (Amended by By-Law No. ~~2016-068~~, ~~December 12, 2016~~ and By-Law ~~2018-002~~, ~~January 28, 2018~~2025-09, May 26, 2025) is hereby repealed.

#### ~~18.16. ENACTMENT~~

~~18.16.1~~ ~~30.1~~ This by-law shall come into force and effect upon the day of passing thereof.

ENACTED this ~~24th~~ day of ~~June, 2019~~, 2025.

Approval	Date	Print Name	Initials
Dept.			
Legal			
Finance			

\_\_\_\_\_  
**D. JaworskyMcCabe, Mayor**

\_\_\_\_\_  
**~~O. Smith~~J. Finley-Swaren, City Clerk**



## **19.17. SCHEDULE “A”**

### **PURCHASING EXEMPTIONS**

This by-law does not apply to the following purchases:

1. Training and Education
  - Conferences, conventions, courses and seminars
  - External continuing education fees, workshops and seminars
  - Magazines, books, periodicals and subscriptions
  - Memberships, association fees or dues
2. Refundable Employees' Expenses
  - Advances (Cash)
  - Meal allowances
  - Taxi fare charges
  - Travel, hotel accommodations expenses
3. City's General Expenses
  - Bank charges
  - Charges to and from other government bodies
  - Collective agreements
  - Damage claims
  - Debenture payments
  - Election expenses including Electronic equipment and ballots (For greater certainty, the City Clerk is exempt from this by-law pursuant to the *Municipal Elections Act*, 1996, S.O. 1996, c. 32, Sched., as amended, in relation to election-related expenses).
  - Fees and charges payable to the Federal and Provincial Government
  - Insurance premiums
  - Licenses (vehicle, firearms, elevators, communications, etc.)
  - Postage
  - Property Rentals
  - Refunds
  - Tax remittances
  - Wages
4. Professional and Special Services
  - Actuarial services and expenses
  - Arbitrator services
  - Committee fees
  - Easements, encroachments and licenses
  - Electronic equipment and ballots for election purposes
  - Employee benefit premium payments
  - Honorariums
  - Insurance claims
  - Investments
  - Legal services
  - Medical, dental, laboratory and pharmacy fees
  - Mortgage/loan payments
  - Payments to local boards
  - Payroll deduction remittances

- Permits certificates acquired through Government agencies
  - Real estate fees or land transfer taxes
  - Real estate transactions, including buying, selling or leasing real property
  - Registry office fees
  - Research assignments
  - Revenue collected on behalf of a third party
  - Witness fees
5. Utilities (monthly charges)
    - Cable Television
    - Hydro
    - Natural Gas
    - Telephone (excluding cellular)
    - Water and Sewer
  6. Payments to educational institutions
  7. Payment to recreation program facilitators or hosts
  8. Events or engagements supporting local non-profit organizations
  9. Entertainers for theatre or special events
  10. Expenses related to an event which it is anticipated will be recovered in full from a third party
  11. Any purchases relating, either directly or indirectly, to a site plan agreement, a subdivision agreement or any other agreement or requirement that is specified in the *Planning Act*, R.S.O. 1990, c. P.13, as amended.
  12. Procurement of Goods intended for resale to the public.
  13. Procurement of Goods or Services on behalf of an entity not covered by this by-law.
  14. Procurements between enterprises that are controlled by or affiliated with the same enterprise or between one government body or enterprise and another government body or enterprise.
  15. Any forms of assistance such as grants, loans, equity infusions, guarantees and fiscal incentives.
  16. Non-legally binding agreements.
  17. Procurement of Goods or Services financed primarily from donations that require the procurement to be conducted in a manner inconsistent with this by-law.

~~20-18.~~ -SCHEDULE "B"

**CHART OF BID IRREGULARITIES OR NON-COMPLIANCE**

**Notes:**

- I) The following list of Bid Irregularities should not be considered exhaustive.
- II) This chart of Bid Irregularities shall apply only where an irregularity exists with respect to a stated requirement of a relevant competitive Bid document (e.g. a RFQ, RFT or RFP) or a RFI issued by the City.
- III) Where notice of a specified time-period to correct an irregularity has been given, or extended by the City and that time period, or extended time period, has elapsed without the correction having been made, the Bidder shall be deemed to be in default and, where applicable, the Bid deposit shall be forfeited. The Bid shall be given no further consideration for award.

ITEM	IRREGULARITY	RESPONSE
<b><u>GENERAL</u></b>		
1.	Bidder, at the time of submission, is not registered to carry on business in Ontario	Rejection.
2.	Late submissions.	Rejection. The submission will not be opened <del>or read publicly.</del> <del>Submission to be returned to Bidder.</del> Should it not be clear as to the Bidder's name and address then the package will be opened solely to access this information.
3.	Unsealed submission package.	Rejection unless, in the opinion of the Director of Procurement, the unsealed submission package did not result in missing information would adversely affect an award decision.
4.	Bidder has not been previously qualified under a related pre-qualification process, where applicable.	Rejection.
5.	Failure to have a representative in attendance and registered at a mandatory attendance site/information meeting.	Rejection.
<del>6.</del>	<del>Submission not completed in a non-erasable medium or signed in ink.</del>	<del>Rejection.</del>
<del>7-6.</del>	Failure to include the Form of Tender, Quotation, Proposal or Pre-Qualification, as may be applicable.	<del>Rejection.</del> <u>Rejection, unless, in the opinion of the Director of Procurement, the missing information is minor and would not adversely affect an award decision.</u>
<del>8-7.</del>	Omission of a detail indicated to be mandatory.	Rejection.
<del>9-8.</del>	Forms that compose the submission documents are not completed in their entirety.	Rejection, unless, in the opinion of the Director of Procurement, the missing information is minor and would not adversely affect an award decision.
<del>10-9.</del>	Conditional Bids (Bids qualified, based on a Bidder's condition or restricted by an appended statement).	Rejection, unless, in the opinion of the Director of Procurement, the qualification or restriction is minor and would not adversely affect an award decision.
<del>11-10.</del>	Bids containing clerical errors that do not result in any ambiguity with respect to the overall submission or award decision, in the opinion of the Director of Procurement.	Two (2) business days to correct and initial.
<del>12.-</del>	<del>Un-initialed changes to the submission.</del>	<del>Two (2) business days to initial changes. The City reserves the right to waive the initialing requirement and accept the submission as corrected.</del>

ITEM	IRREGULARITY	RESPONSE
<del>13.</del>	<del>Signature missing on the Form of Tender, Quotation, Proposal or Pre-Qualification, as may be applicable.</del>	<del>Rejection.</del>
<del>14.</del>	<del>Failure to include required supplementary copies of the original at time of submission.</del>	<del>Two business days to submit.</del>
<del>15.</del> 11.	Failure to acknowledge addenda.	Rejection, unless, in the opinion of the Director of Procurement, the failure to acknowledge was an oversight and the contents of the addenda would not adversely affect an award decision.
<del>16.</del> 12.	Any irregularity or non-compliance.	Despite the provisions herein contained, Council may waive any irregularity or non-compliance.
<b>PRICING</b>		
<del>17.</del> 13.	Failure to include the schedule(s) of items & prices, price form or price details, as may be applicable, for inclusion with the submission.	Rejection, unless, in the opinion of the Director of Procurement, the missing information is minor and would not adversely affect an award decision.
<del>18.</del> 14.	Pricing appears to be unbalanced to the extent that it may have a significant adverse effect to the City if awarded, in the opinion of the Director of Procurement.	Rejection.
<b>BID DEPOSIT</b>		
<del>19.</del> 15.	Bid deposit or Bid Bond not submitted with Bid.	Rejection.
20.	Bid deposit or Bid Bond amount is insufficient by more than \$1,001.	Rejection.
21.	Surety provider's or Bidder's authorized signature missing from Bid Bond.	Rejection.
22.	Effective period of Bid Bond is less than the period set out in the Bid documents.	Rejection.
<b>AGREEMENT TO BOND</b>		
23.	Agreement to bond not submitted with Bid.	Rejection.
24.	Agreement to bond not in the form specified.	Rejection.
25.	Agreement to bond amount is insufficient by more than \$1,001.	Rejection.
26.	Surety provider's or Bidder's authorized signature missing from agreement to bond.	Rejection.
<b>POST AWARD NOTIFICATION</b>		
27.	Failure to execute required bonding or financial security within the prescribed time-period.	Rejection and Bid deposit forfeiture.
28.	Failure to execute a contract within the prescribed period.	Rejection and Bid deposit forfeiture.
29.	Failure to provide supporting documents, as specified within the Bid document and within the prescribed period.	Rejection and Bid deposit forfeiture.

**24.19. SCHEDULE “C”**

**THRESHOLDS OF PROCUREMENT METHODS**

<b>Category</b>	<b>Estimated Purchase Value<sup>1</sup> (excluding tax)</b>	<b>Allowable Procurement Methods</b>	<b>Advertising Requirement</b>
<del>Low-Cost Purchase (Purchasing Card, Negotiation or RFQ— facilitated by Division requiring Good and or Service)</del>	<del>Up to \$49,999</del>	<del>Limited Procurement undertaking by Division requiring Goods and / or Services  Standing Arrangement  Multi-Use List  Open-Competitive</del>	<del>Discretionary—Not Required</del>
<del>Goods and Services (RFQ, RFT, RFP, RFPQ—facilitated by Procurement Division)</del>	<del>\$50,000 Up to \$100,000</del>	<del>Limited Procurement facilitated by Procurement— competitive bids to be solicited from a minimum of 3 Bidders unless approval obtained from the Director of Procurement to solicit less than 3 bids.  Standing Arrangement  Multi-Use List  Open-Competitive</del>	<del>Limited Procurement— determined based upon number of invitees  Standing Arrangement and Multi-Use List—as required pursuant to the arrangement  Open-Competitive— Advertising mandatory</del>
	<del>Over \$100,000</del>	<del>Open-Competitive</del>	<del>Mandatory</del>
<del>Emergency Purchase</del>	<del>Any Value</del>	<del>Purchase to be carried out in accordance with the provisions of this by- law.</del>	<del>Not Required</del>
<del>Non-Competitive Procurement</del>	<del>\$100,000 and over</del>	<del>Only permitted if approvals as set out in this by-law have been obtained</del>	<del>Not Required if approvals as set out in this by-law have been obtained</del>

**20.** <sup>1</sup> **Estimated Purchase Value** is the factor that determines the appropriate procurement method. In determining the Estimated Purchase Value consideration must be given to the total value of the procurement over its entire duration, whether awarded to one or more suppliers, taking into

~~account all forms of remuneration, including (i) premiums, fees, commissions and interest; and (ii)  
the total value of renewals if the procurement provides for the possibility of renewals~~

## 21. SCHEDULE "D"

### PURCHASING STATEMENT OF ETHICS

All individuals authorized to purchase goods, services, and/or construction on behalf of the City of Waterloo must adhere to the City's Code of Conduct Policy and the following procurement principles:

#### 1. Open and Honest Dealings with All Involved in the Procurement Process

- Procurement activities must be transparent and accountable. This includes interactions with all businesses the City contracts with or purchases from, as well as all staff members and the public who utilize procurement services.

#### 2. Fair and Impartial Award Recommendations for All Contracts and Tenders

- Contracting and procurement activities must be fair, transparent, and aimed at obtaining the best value for public money. Preferential treatment to any vendor, including local companies, is prohibited to ensure fair and open competition.

#### 3. An Irreproachable Standard of Personal Integrity

- Individuals involved in procurement must act with integrity and professionalism. Honesty, care, and due diligence are essential. Respect for each other and the environment is paramount. Confidential information must be safeguarded, and conflicts of interest must be avoided.

#### 4. Cooperation with Other Public Agencies

- The City will collaborate with other public agencies to achieve the best value for every tax dollar. This includes participating in cooperative purchasing groups to leverage collective expertise and resources.

#### 5. Continuous Development of Procurement Skills and Knowledge

- All procurement team members are encouraged to continuously improve their knowledge and skills through available opportunities, ensuring adherence to good public purchasing principles.

#### 6. Declaration of Conflicts

- All participants in a procurement process, including external consultants or service providers acting on the City's behalf, must declare any perceived, possible, or actual conflicts of interest.

#### 7. Personal Purchases

- No purchase will be processed for personal items of direct benefit to officers or employees of the City or any member of Council, except where permitted by policy.

#### 8. Purchases from City Employees

- No Deliverables will be purchased from an officer or employee of the City, or any associate or immediate family member, except where permitted under this by-law.

#### 9. Conflict of Interest Forms

- All City employees and others participating in the evaluation for any procurement process must complete and sign a Conflict of Interest Form.



## STAFF REPORT

### Facility Design & Management Services

Title: Federation of Canadian Municipalities Community Buildings Retrofit Capital Project Grant  
Report Number: COM2025-031  
Author: Scott Prevost, Energy Program Manager  
Gracjan Oleksinki, Senior Financial Analyst  
Council Date: December 1, 2025  
File: NA  
Attachments: NA  
Ward No.: 4

### Recommendations:

1. That Council approve report COM2025-031.
2. That Council approve the City of Waterloo's application to the Federation of Canadian Municipalities Community Buildings Retrofit Capital Project grant program for the infrastructure project RIM Park Energy and Accessibility Retrofit with a project value of \$10,000,000.
3. That if the City of Waterloo's RIM Park Energy and Accessibility grant application is approved, Council approves the release of 2026 non-routine capital funding for the City portion in the amount of \$2,000,000 funded from ref #225 and a \$6,000,000 loan portion funded from ref #225 to be repaid over a 10-year term.
4. That Council authorize the Mayor and Clerk to sign the grant transfer agreement and any other related documents, subject to the satisfaction of the City Solicitor.

### A. Executive Summary

The Federation of Canadian Municipalities (FCM) through the Green Municipal Fund (GMF) administers various grant programs targeting environmental adaptation, energy efficiency, Greenhouse Gas (GHG) emissions reductions, sustainable infrastructure, local energy generation, and other initiatives.



FCM currently administers a program providing grants and loans for municipally owned community building retrofit projects improving energy efficiency and significant GHG emissions reduction. The program deadline for capital projects is December 19, 2025.

FCM requires the City to take on the loan to receive the grant (the City cannot receive the grant only, while avoiding the loan). However, based on FCMs current interest rate, it is financially advantageous for the City to receive the grant and pay off the loan over the term, as the grant offsets interest payments made on the loan. The RIM Park Energy and Accessibility Retrofit project (ref #225) was already planned to be financed by CIRRF-debenture making this an ideal candidate project to submit.

FCM evaluates submissions based on three main criteria:

- Impact
- Implementation
- Transformative potential

Within each criteria are additional evaluation parameters.

Impact is evaluated based on environmental benefits, financial benefits, and community benefits. Implementation is based on stakeholder engagement, team and partners, workplan and budget, risk management, financing, and measurement and monitoring. Transformative potential is based on capacity building, replication potential, innovation, and audacity.

A funding decision is estimated six (6) to eight (8) months post submission.

The RIM Park Energy and Accessibility Retrofit project forming the basis of submission is a scaled back version of the RIM Park project submitted for the Green and Inclusive Community Buildings (GICB) grant program (COM2024-034) previously submitted to in October 2024, which the City has not received a decision on.

The FCM community buildings capital project grant program allows “stacking” of grants. If the City is successful with the GICB grant, FCM allows the City to revise eligible costs and leverage both programs. Applying to this FCM grant does not restrict the City’s ability to receive funds from the GICB program.

The RIM Park Energy and Accessibility Retrofit project includes infrastructure renewal including Heating, Ventilation, and Air Conditioning (HVAC) equipment electrification, boiler plant electrification, Building Automation System (BAS) and controls, roofing replacement, dehumidification retrofit, accessible washroom upgrades, and inclusive space addition.

This project reduces RIM Park GHG emissions by approximately 500 tonnes of carbon dioxide equivalent (CO<sub>2</sub>e) or approximately half of RIM Park total GHG emissions. The heating plant equipment and infrastructure will support and enable an additional 220

tonnes of GHG emissions savings when remaining HVAC equipment infrastructure is renewed at end of life (approximately 2033).

## **B. Financial Implications**

The FCM CBR Capital Project grant will fund 80% of eligible capital expenditures. The City of Waterloo grant submission is for The RIM Park Energy and Accessibility Retrofit project with an estimated total cost of \$10,000,000. The program funds projects up to eligible costs of \$10,000,000 (maximum project construction value). Eligible costs can be claimed once the full application has been submitted to FCM. The FCM CBR Capital Project grant would provide \$8,000,000 in support broken down by \$6,000,000 in a repayable loan and \$2,000,000 in a nonrepayable grant.

The City plans to pursue the FCM CBR Capital Project grant loan with a 10-year term which would result in an estimated interest rate of 3.7% and total interest expense of \$1.29M. Debt financing secured through The Region of Waterloo could provide a slightly lower interest rate at approximately 3%-3.5% based on the Region's AAA credit rating and recent debenture issuance. However, with the FCM CBR Capital Project grant also providing a \$2,000,000 grant contribution, the City receives a direct grant contribution and also requires a lower principal amount to be borrowed.

## **C. Technology Implications**

N/A

## **D. Link to Strategic Plan**

(Strategic Priorities: Reconciliation, Equity, Accessibility, Diversity and Inclusion; Environmental Sustainability and Climate Action; Complete Community; Infrastructure and Transportation Systems; Innovation and Future-Ready)

(Guiding Principles: Equity and Inclusion; Sustainability; Integrity; Workplace Wellbeing; Community-centred; Operational Excellence)

This report and grant application support the strategic priorities of:

- Environmental Sustainability and Climate Action through reducing GHG emissions at City buildings and increasing resilience to climate change.
- Infrastructure and Transportation Systems through infrastructure renewal as the project focuses on core building infrastructure renewal and alignment with energy and GHG measures.
- Reconciliation, Equity, Accessibility, Diversity, and Inclusion through identified enhancement and new building features

**E. Previous Reports on this Topic**

- COM2024-034 Green and Inclusive Community Buildings Grant Third Intake
- COM2024-032 FCM Green Municipal Fund Local Climate Adaptation Grant
- COM2024-024 Federation of Canadian Municipalities Green Municipal Fund Sustainable Municipal Buildings GHG Study Grant
- COM2023-004 Green and Inclusive Community Buildings Grant Second Intake
- COM2021-019 Green and Inclusive community Buildings Grant First Intake



**Federation of Canadian Municipalities Community Buildings Retrofit Capital  
Project Grant  
COM2025-031**

## **Background**

The Federation of Canadian Municipalities (FCM) administers various grant, loan, and funding programs for municipalities through their Green Municipal Fund. Currently, the Community Buildings Retrofit (CBR) program is accepting applications for Capital Project funding.

FCM CBR Capital Project submissions require, in addition to other criteria, a detailed Greenhouse Gas (GHG) emission reductions study providing different pathway scenarios to reduce GHG emissions and increase energy efficiency.

The City of Waterloo (City) previously received funding from FCM to complete this study at RIM Park and submitted the study as part of the pre-application process. The study was accepted and enables the City to apply for funding for any implemented measures assessed in the study, as they meet the program requirements.

The deadline to apply is December 19, 2025 for the current intake. On its website, FCM indicates the program will reopen early 2026 under a combined capital project grant program, which allows community building (community centres, recreation centres, libraries, etc.) and municipal building (city halls, service centres, etc.) to be submitted under the same program. If this grant application is unsuccessful, there will likely be future application opportunities under the revised program.

## **FCM Capital Project grant overview**

The FCM Capital Project grant program funds GHG, energy, and climate resilient projects. Capital projects should consist of one or more phases in a sequence of retrofit measures (pathway) to reduce emissions at the facility by at least 50 percent within 10 years and achieve best practice energy targets within 20 years. Applications are encouraged to demonstrate a pathway that reduces the most GHGs in the near term through the pursuit of a deep energy retrofit and fuel-switch. The measures identified in the completed study enable the City to apply for this grant.

FCM's Capital Project grant program provides a combination grant and loan to the municipality, and these cannot be separated.

The grant and loan amounts are provided to the City through claims as the project progresses. The loan repayment term is minimum 10 years and cannot be excluded.

Capital Project grant submissions are competitively evaluated based on:

- Impact
  - Environmental benefits
  - Financial benefits
  - Community benefits
- Implementation
  - Stakeholder engagement
  - Team and partners
  - Workplan and budget
  - Risk management
  - Financing
  - Measurement and monitoring
- Transformative potential
  - Capacity building
  - Replication potential
  - Innovation
  - Audacity

Should the City receive a successful funding decision for the previously submitted Green and Inclusive Community Buildings (GICB) program (COM2024-0034), this FCM grant can be “stacked” with that grant. It does not limit the City pursuing alternate grants with higher percentage funding levels.

The City can secure financing through the Region of Waterloo at a slightly lower interest rate than offered through FCM. However, with the FCM grant component (\$2 million) it is financially advantageous for the City to pursue this grant compared to financing the project through the Region of Waterloo with no grant contribution.

### **RIM Park Energy and Accessibility Retrofit**

The City’s project application focuses on three (3) main pillars: infrastructure renewal, electrification of existing natural gas fired heating equipment, and accessible and inclusive upgrades.

The project, titled RIM Park Energy and Accessibility Retrofit, contains overlapping scope components to the Green and Inclusive Community Buildings (GICB) grant application (COM2024-034), but with a decreased scope. The current project scope excludes replacement of select HVAC infrastructure and certain accessibility, inclusion, and equity components.

The current project is structured such that if the City’s GICB submission is successful, scope will be increased to match the full scope included in the GICB application.

The RIM Park Energy and Accessibility Retrofit includes:

- Replacement of remaining 2001 vintage HVAC equipment with Air Source Heat Pumps (ASHPs).
- Installation of Air-to-Water Heat Pumps (AWHPs) to offset boiler plant natural gas consumption (for space heating and domestic hot water).
- New electric powered dehumidifier serving three (3) of the four (4) rinks.
- New Building Automation System (BAS) controls.
- Replace remaining 2001 vintage roof sections and increase insulation where permissible.
- New universal washroom is located between all four (4) rinks.
- New gender-neutral dressing rooms.

The refrigeration plant heat recovery system may be replaced, depending on replacement system direction.

The overall construction project also includes the installation of a natural gas fired back-up generator, providing increased back-up electrical generation capacity compared to the existing diesel generator. This scope is excluded from the FCM Capital Project grant as it is funded through a separate FCM grant (COM2024-032).

Table 1 provides the estimated electricity, natural gas, and GHG emissions savings achieved through the project. Improved BAS controls are expected to yield additional savings; however, they are unquantified below.

Table 1: RIM Park Energy and Accessibility Retrofit GHG savings

Measure	Electricity savings		Natural gas		Net GHG savings tCO <sub>2</sub> e
	kWh	GHG tCO <sub>2</sub> e	m <sup>3</sup>	GHG tCO <sub>2</sub> e	
ASHP replacement	-451,744	-37	136,483	259	223
Heat recovery unit replacement	-204,278	-17	72,565	138	121
Electric dehumidification	-418,834	-34	49,593	94	60
Electric DHW heater	-239,309	-19	29,914	57	37
<b>Project totals</b>	<b>-1,314,165</b>	<b>-106</b>	<b>288,555</b>	<b>548</b>	<b>442</b>

Total project costs are estimated at \$10 million, corresponding with the maximum eligible project cost for the FCM Capital Project grant.

### FCM grant timelines

The key grant milestones and timelines are provided below:

- Application pre-approval (completed)
- Council approval – December 1, 2025

- Program submission deadline – December 19, 2025 at 4:00 pm
- FCM funding decision – September 2026
- FCM deadline to complete project – September 2029

The City procured design consulting services for the RIM Park project in earlier this year, and design is underway. Construction is planned early spring 2026.

The FCM program considers eligible costs from the time of full application submission. The City will commence construction prior to FCM's funding decision; however, all construction costs will be considered eligible. Grant funding is not at risk from a timing or scheduling perspective.

### FCM grant financing

The FCM Capital Project grant program provides repayable (loan) and non-repayable (grant) funding to the City. The grant portion is 20% of total eligible project costs and the loan portion is 60% of total eligible project costs and the City cannot receive the grant without the loan Table 1 provides the program grant, loan, and require City of Waterloo (City) funding percentages.

Table 1: FCM CBR Capital Project grant funding

<b>Funding source</b>	<b>Percent project cost</b>	<b>Funding</b>
FCM grant contribution	20%	\$2,000,000
FCM loan contribution	60%	\$6,000,000
City of Waterloo contribution	20%	\$2,000,000
<b>Total</b>	<b>100%</b>	<b>\$10,000,000</b>

The FCM loan is repaid over a minimum 10-year period at a constant interest rate. The loan and grant are distributed to the City through reimbursement claims made by the City to FCM for incurred project costs. All loan contract details are finalized when the funding agreement is signed between the City and FCM.

Alternatively, if the City acquired \$10 million in debt to finance the full project it would do so through the Region of Waterloo. The interest rate available through the Region of Waterloo is lower than the interest rate available through FCM. However, debt financing through the Region of Waterloo does not include a grant contribution of \$2 million.

Determining the financially advantageous scenario between FCM and Region of Waterloo financing includes adding total interest paid (to each lender individually) and adding the grant portion (non-existent through the Region of Waterloo). The FCM Capital Project grant program represents a strong financial return to the City due to the grant contribution (\$2 million) more than covering the slightly higher interest cost.

**Upcoming related Staff Reports to Council****RIM Park Energy and Accessibility Retrofit – Equipment tender**

The RIM Park Energy and Accessibility Retrofit project is targeting funding through grant programs; however, the base (or core) amount of infrastructure must proceed to ensure functional facility use. This includes ensuring heating, cooling, and ventilation is provided through HVAC past end of life, renewing aged/obsolete and proprietary BAS controls, and replacing wearing roof.

To accommodate equipment, lead times and facility operation, the City will tender long lead time mechanical equipment separately, prior to the main construction tender being issued. Contract approval may require Council approval based on value to proceed.

**RIM Park Energy and Accessibility Retrofit – Main construction tender**

The City is targeting early 2026 to tender the main construction project for this project RIM Park Energy and Accessibility Retrofit, which will exceed \$1 million in construction costs and require Council approval.

**Moses Springer Community Centre GHG and Accessibility Retrofit**

The City's Moses Springer Community Centre (MSCC) GHG and Accessibility Retrofit application to the third GICB intake (COM2024-034) was successful, and the City is in the design phase for this project application.

The City will issue the main construction tender package early 2026 as well, which will require Council approval. The MSCC project includes:

- Electrification of natural gas fired HVAC and water heating systems
- LED lighting
- New BAS controls
- Refrigeration heat recovery
- Universal washroom and accessible pathways
- New roofing (building and arena)
- New arena dehumidification with space cooling, enabling summer operation of the interior arena space

The project construction cost is estimated at \$3 million total. The City is contributing \$600,000 and GICB is contributing \$2.4 million (80% funding rate). This project aligns with facility infrastructure renewal and adds arena space cooling and increases accessibility/inclusivity at MSCC.





**STAFF REPORT**  
**Reconciliation, Equity, Accessibility, Diversity and Inclusion**

Title:	Get READI Benchmarking and Implementation Plan
Report Number:	CAO2025-022
Author:	Divya Handa and Adam Nerger
Council Date:	December 1, 2025
File:	N/A
Attachments:	Get READI Benchmarking and Implementation Plan
Ward No.:	All

**Recommendations:**

- 1) That Council accepts report CAO2025-022 for informational purposes.

**A. Executive Summary**

The Get READI Benchmarking and Implementation Plan (the Plan) provides an overview of actions taken by the City of Waterloo to meet the goals set out in the City's Get READI Plan, which was adopted by Council on December 16, 2024. The Plan is a means to ensure transparency and accountability of action to Waterloo residents, as well as a way in which to monitor the City's progress as it works to meet the priorities and goals set out in the Get READI Plan. The goals of the Get READI Plan are further reflected in Priority 1 of the City's Strategic Plan (2023-2026) embodying the values of Reconciliation, equity, accessibility, diversity, and inclusion (READI). A copy of the Plan has been included as an attachment for Council's consideration.

The READI team intends to provide annual updates to Council and residents through the Plan. It will be a tool to report back on actions being taken, planned, or implemented towards achieving the goals set out in the Get READI Plan.

**B. Financial Implications**

There are no new funding requests associated with this report at this time and implementation will be resourced from existing 2026 Capital and Operating funds. Financial considerations will be identified on a continuous basis through the ongoing review and update of the Plan. Consideration and prioritization of any implementation funding needs that exceed existing approved operating and capital budgets will be

included in future budgets for consideration, and prioritized recommendations will be brought forward for Council's consideration and approval. Efforts to support barrier-free access to services, programming, engagement, and employment with the City will require targeted funding to meet the needs of all residents and employees of the City of Waterloo.

### **C. Technology Implications**

Technological support will continue to be required to ensure virtual and hybrid meeting capacities remain available for community engagement opportunities to ensure an inclusive approach for all. Additionally, support to continue making website improvements with an emphasis on AODA requirements is necessary to better enable access for all residents to participate across the City of Waterloo.

### **D. Link to Strategic Plan**

(Strategic Objectives: Reconciliation, Equity, Accessibility, Diversity and Inclusion; Environmental Sustainability and Climate Action; Complete Community; Infrastructure and Transportation Systems; Innovation and Future-Ready)

(Guiding Principles: Equity and Inclusion; Sustainability; Integrity; Workplace Wellbeing; Community-centred; Operational Excellence)

Strategic Priorities: Reconciliation, Equity, Accessibility, Diversity and Inclusion

Guiding Principles: Equity and Inclusion

### **E. Previous Reports on this Topic**

- CAO2024-027 2024 Get READI Plan – September 23, 2024
- CAO2024-029 2024 Get READI Plan – December 16, 2024



### **Get READI Benchmarking and Implementation Plan CAO2025-022**

In June 2023, the Reconciliation, Equity, Accessibility, Diversity, and Inclusion (READI) team completed a request for quotations (RFQ) to develop the City of Waterloo's first-ever Reconciliation, equity, and accessibility strategy. Taylor-Newberry Consulting (TNC) was the successful bidder to develop the strategy, known as the Get Reconciliation, Equity, Accessibility, Diversity, and Inclusion (READI) Plan.

After completing a detailed documents scan of the City of Waterloo's governance documents, as well as applicable federal, provincial, and regional reports, and other community-produced publications, TNC held two community engagement sessions in November 2023. These sessions offered an opportunity to connect with community representatives and leaders to receive feedback on the needs, experiences, and desired actions and outcomes they expected.

The READI team also completed internal engagement, meeting with a number of staff from 27 teams across the City, during Fall 2023 and Winter 2024. These conversations helped the READI team to understand the actions taken by staff to embed Reconciliation, equity, and accessibility into programs, services, and operations affecting residents.

Summaries of the community and staff engagements were prepared by TNC to capture the feedback obtained from both groups. A copy of the community engagement summary was shared externally with community participants, while a copy of the staff engagement summary was shared internally for staff awareness. Both groups provided feedback on the summaries, which resulted in the first iteration of the Get READI Plan.

A second round of community engagement sessions was held in June 2024. Additional conversations were held with those who expressed interest in providing feedback but were unable to attend these sessions. Feedback from this round of engagement was used to revise the next iteration of the Get READI Plan, which was then shared with teams internally to capture staff sentiments. This round of engagements gathered feedback and input on the priority areas and goals outlined in the Get READI Plan.

Finally, feedback was solicited from the Corporate Management Team and Operational Leadership Team to produce a third version of the Get READI Plan, which was presented to Council for input on September 23, 2024.

The Get READI Plan received final approval and adoption by way of Council resolution at the December 16, 2024, Council meeting. It has since been shared broadly with community partners, as well as residents, through a communications strategy initiated in

February 2025. Following adoption of the Get READI Plan, the READI team at the City have drafted a Benchmarking and Implementation Plan (the Plan) to support monitoring of staff efforts to meet the goals set out in the Get READI Plan in a manner that ensures accountability and transparency to the Waterloo community. In developing the initial draft of the Plan, the READI team has continued to liaise with staff across the City to capture their actions, those that have been completed, are ongoing, or are planned to start, as well as engaged with community representatives, including the Reconciliation Action Partnership, the Grand River Accessibility Advisory Committee (GRAAC), and the Age-Friendly Committee.

### **Overview of the Get READI Plan**

The Get READI Plan is a strategic tool designed to guide all City of Waterloo divisions in embedding Reconciliation, equity, and accessibility into their plans, budgets, and services and programs for residents and visitors. It is the result of a joint effort between the City of Waterloo's READI team, community members, and staff teams across the City.

The Get READI Plan sits within Council's Strategic Plan (2023-2026) by upholding its guiding principles while directly advancing the objectives described under the READI strategic priority. Additionally, Priority Area #1 of the Get READI Plan, which focuses on improving the City's relationships with Indigenous communities and fostering Reconciliation, is purposefully designed to situate it within the Reconciliation Action Partnership's Strategic Plan: A Pathway Forward.

The Get READI Plan reflects on the growth of the City of Waterloo over the years, how the City understands itself, and the experiences of community members in their interactions with the City. It also attempts to acknowledge the work needed to make the City a welcoming and inclusive space for all residents. It identifies priority areas and targeted, thoughtful goals that can have a positive impact on the many communities and residents in Waterloo.

The Get READI Plan outlines six priority areas to guide the work of the City for the next five years. This timeline is meant to align with the renewal periods of the City's Multi-Year Accessibility Plan and the City's municipal budgeting process.

The priority areas are:

1. Improve Indigenous relations and foster Reconciliation.
2. Enhance the built environment.
3. Cultivate a culture of belonging.
4. Increase diversity of staff and leadership.
5. Focus on equitable distribution of resources.
6. Build trust through systems of accountability.

The goals within each priority area include short, medium, and long-term aspirations as some may extend beyond the timelines of this plan, thus requiring longer-term planning and resource allocation.

## **Overview of the Implementation Plan**

Staff across the City have identified ongoing and planned efforts to advance the goals in the Get READI Plan. These efforts are tracked in a Benchmarking and Implementation Plan for the first time ever. Moving forward, the READI team will continue to engage with all other teams to record and update staff efforts for annual publications of the Implementation Plan (the Plan).

The Plan captures specific activities, projects, and initiatives happening across the City. It is intended to be a living document that will be updated annually to establish a feedback loop with the broader Waterloo community. Through ongoing dialogue with the Plan as a backdrop, the READI team can communicate City actions to residents and community partners, and identify areas for improvement or redirection to share with staff that will help address gaps and concerns in programming, services, and practices of the City.

It must be recognized that this first version of the Plan documents staff intentions and actions that date back to 2017. Through direction of senior leadership, in 2017, an initial Diversity Equity and Inclusion (DEI) Working Group was established in response to the experiences of staff and community members to various national, social events. Through this working group, the City began to provide Reconciliation, equity, and accessibility awareness training, to review and adapt programming and service delivery, and to review City facilities to better enable participation of residents with disabilities. All this work also led to the formation of the READI team in 2022. Although the Plan heavily reflects more recent efforts, it is also meant to showcase the important work that has brought the City to where it is today. The Plan then, importantly, is also an acknowledgement of staff's intentions to create a more welcoming and inclusive City for all.

Annual updates of the Plan will support future efforts to develop a measurement framework, which will establish criteria that the City can utilize to measure its impact in implementing the Get READI Plan.

## **Staff and Community Engagement for the Implementation Plan**

A draft of the Get READI Benchmarking and Implementation Plan (the Plan) was shared with teams across the City for their review and feedback in Spring 2025. Teams had the opportunity to review the information they had offered in 2023 and 2024 with the READI team, and to share additional efforts that had occurred or that have been planned for implementation since that time to be incorporate into the Plan.

Following receipt of feedback from staff, the READI team has also engaged with community groups for additional feedback. Formal engagement opportunities included:

- Staff engagement and follow up, Summer 2025
- Mayor's Community Conversation, September 2025
- Age-Friendly Committee, October 2025

- Reconciliation Action Partnership, October 2025
- Grand River Accessibility Advisory Committee, October 2025

Through these and other informal engagements, community representatives have advised that the City, along with other regional local governments through coordinated efforts:

- Needs to improve communications to residents and the public about the programs, services, and opportunities that are available, as well as improve points of access to these opportunities. Residents lack awareness of supports that are available to them, including assistance for their unique needs.
- Should explore and expand its capacity to advocate on behalf of equity-denied groups where it is not, or is limited in resources or ability to be, a service provider (example: addressing rise in encampments and related housing needs).
- Must continuously work with other local governments, community leaders, and representatives to ensure that limited resources, whether human or financial, are directed towards the highest needs in vulnerable communities. This requires ongoing relationship building and maintenance, increased transparency, and intentional growing of trust within communities.

### **Future Considerations**

To support wider engagement that fosters inclusion and trust with all residents, increased financial resources will be required. This is recognized through budget requests that include considerations for adequate honorariums, transportation reimbursement, and childcare assistance that are factored into engagement and community-collaboration costs developed by staff when planning projects and initiatives. These costs should be factored into departmental budgets to allocate room for unexpected or emergent engagement opportunity needs.

Additionally, adapting existing programs and services, event planning protocols and approaches to engagement, and data collection methodologies to reflect more accessible and equitable processes will require funding supports. Whether these improvements are realized through technology adaptations or honorariums for those with lived experience, they need to be factored into future plans and budgets.

For staff wellbeing, focused attention on building pathways that address the READI-specific concerns and challenges raised through the 2024 Staff Census and Survey will also require financial supports. Staff at the City reflect the broader Waterloo community and require a workplace that is intentionally designed to provide spaces where individuals of various identities can thrive. Increased financial commitment to ensure improvements in the City's workplace experience will likely be required and should be considered within the upcoming city-wide budget process.

**Next Steps**

Following presentation of the Plan to Council in December 2025, the READI team will incorporate any feedback received from discussion with Council. Through collaboration with Communications, a digital version of the Plan will be made available to community leaders, partners, and representatives, as well as to the community at large. In addition to this overarching digital version, one-page handouts of each priority area with examples of projects and initiatives advancing the goals within that area will also be created to share with community members in hopes of better communicating the programs and services available to them. These handouts will be translated into the languages that are most spoken in Waterloo.

Moving forward, the Plan will be updated and published annually to support transparency and accountability to the broader Waterloo community. In collaboration with community leaders and representatives, staff across the City will additionally identify future opportunities to engage with communities, improve services and programs, and communicate successes.

# GET READI BENCHMARKING AND IMPLEMENTATION PLAN

---

The City of Waterloo is committed to planning, budgeting, and providing services and programs for residents and visitors guided by the principles and values established in the [Get Reconciliation, Equity, Accessibility, Diversity, and Inclusion \(READI\) Plan](#).

The purpose of this first iteration of the Get READI Benchmarking and Implementation Plan is to share progress made by the City of Waterloo towards the objectives in the Get READI Plan, and to recognize the work done to date by City teams, City Council, and community partners.

While some work has been initiated successfully, we recognize that there is still much work ahead, and that this work is ongoing and continuous. The Get READI Benchmarking and Implementation Plan sets the foundation for the City's work to advance READI.

The City of Waterloo looks forward to continuing to work in partnership with the community to be accountable for progress made. We look to community to help set the direction we pursue as we deconstruct each goal of the Get READI Plan to rebuild a more inclusive and welcoming City of Waterloo.

For questions or comments about this document, please contact the READI team at [diversityandinclusion@waterloo.ca](mailto:diversityandinclusion@waterloo.ca).

Follow our project and provide feedback directly through [engage.ca](#), or get more information from [our website](#).



City of Waterloo Strategic Plan (2023-2026):

- Objective 2: Embed Reconciliation, equity, accessibility, diversity and inclusion across the organization
- Objective 3: Advance Reconciliation

## Get READI Plan (2025-2030) priority area 1: Improve Indigenous relations and foster reconciliation

Goal	Action(s)	Team:	Complete before December 2024	Completed in 2025	Not started: Indicate anticipated start date, funding estimate and source
<b>1.1</b> Provide staff with educational opportunities to learn about the histories, practices, worldviews, and experiences of Indigenous Peoples.	Training offered by partners:  Provided through Ontario Health: <ul style="list-style-type: none"> <li>• First Nations, Inuit and Metis Culture Colonization and the Determinants of Health</li> </ul>	Community Programming and Outreach Services	x	X 100% of Community Support Services staff are trained	x
	Training hosted by the Reconciliation Action Partnership: <ul style="list-style-type: none"> <li>• Lunch and learns</li> <li>• 4 Seasons of Reconciliation</li> <li>• Reconciliation: Discussion and Implications for Settler people</li> <li>• Indigenous Engagement Workshop</li> </ul>	All staff		x	
	Training offered by the READI team at City of Waterloo: <ul style="list-style-type: none"> <li>• Learning Days</li> <li>• Sacred Fires demonstrations</li> <li>• Canadian Centre for Diversity and Inclusion</li> <li>• Learning Management System (LMS) training offerings with reflection opportunities</li> </ul>	All staff  Community Programming and Outreach Services  Fire Rescue Services Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	X Museum & Archival Collections supported a staff learning day through an exhibition focused on understanding the harms and trauma caused by the	x

Get READI Benchmarking and Implementation Plan | 2

				Residential School system	
	READI Library <ul style="list-style-type: none"> <li>Partnership with Waterloo Public Library, local book stores</li> <li>Paperback and audiobooks available for staff</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion		x	x
<b>1.2</b> Increase public awareness of the histories, practices, worldviews, and experiences of Indigenous peoples.	Museum & Archival Collections' exhibitions: <ul style="list-style-type: none"> <li>Inclusive storytelling and relation to current exhibitions in the museum</li> <li><i>Rock This Town</i></li> <li><i>Killing the Indian in the Child: Generations Lost</i></li> <li><i>Bi-Giwen: Coming Home - Truth-Telling from the Sixties Scoop</i></li> <li><i>Bead the Tract</i> and Original Graphic Recordings by Dakota Brant</li> </ul>	Community Programming and Outreach Services	x	x	x
	Museum & Archival Collections hosts an interactive display during Treaty Recognition Week featuring an 800-piece LEGO® Wampum Belt representing the Treaty of Niagara <ul style="list-style-type: none"> <li>Produced through the Ontario and Anishinabek Nation Treaty Education Resources initiative</li> <li>Belt was designed by nine-year-old Alexander Hebert from Dokis First Nation</li> <li>Visitors are invited to help build the belt and learn about the significance of treaties and wampum in Indigenous-settler relations</li> </ul>	Community Programming and Outreach Services	x (started in 2019)	x	x
	Support public awareness through the following practices: <ul style="list-style-type: none"> <li>Smudging at Seniors Health Fair</li> <li>Inclusion of Indigenous health providers at Health Fair</li> <li>Indigenous Intergenerational Cooking Class and Workshop</li> <li>Indigenous Medicine Talk</li> <li>Display at Community Pavillion in recognition of Red Dress Day</li> <li>Leverage neighborhood newsletter for community education of days of significance</li> </ul>	Community Programming and Outreach Services  Economic Development  Legislative Services, Information Security and Privacy	x	x	x

Get READI Benchmarking and Implementation Plan | 3

	<ul style="list-style-type: none"> <li>Indigenous Drumming Circle: Inaugural event for Council in 2022</li> <li>Continue annual installation of Land Acknowledgement art piece in Waterloo Public Square for National Indigenous Peoples Day in collaboration with Indigenous artists and community partners</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion			
	Update public art policy mandate to diversify public art collection	Economic Development			x
	Statements for Indigenous days of recognition/significance <ul style="list-style-type: none"> <li>Posted to social media</li> <li>Shared by Council</li> </ul>	Corporate Communications  Legislative Services, Information Security and Privacy  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	x
	Wampum Belts gifted to City <ul style="list-style-type: none"> <li>On display at City Hall</li> <li>Can be used by all staff</li> <li>Brought into Council meetings</li> <li>Can be utilized for Staff training</li> </ul>	Community Programming and Outreach Services  Legislative Services, Information Security and Privacy  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x set up of display at city hall by Museum staff	x displayed Wampum Belts at Museum during the Bead the Tract Exhibit	x
	Explore opportunities for Indigenous art or visual representations of Indigenous history in the Council Chambers	Economic Development  Facility Design and Management Services			x

		Legislative Services, Information Security and Privacy  Reconciliation, Equity, Accessibility, Diversity, and Inclusion			
<b>1.3</b> Improve and build relationships with local Indigenous communities and organizations.	Active memberships <ul style="list-style-type: none"> <li>• Reconciliation Action Partnership</li> <li>• Wilfrid Laurier Indigenous Education Council</li> <li>• Association of Municipalities of Ontario – Indigenous Advisory Council</li> <li>• Municipal Connections Circle – National sharing group</li> </ul>	Community Programming and Outreach Services  Corporate Communications  Financial Planning & Asset Management  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	x
	Ongoing consultation <ul style="list-style-type: none"> <li>• Land Use Planning Together (LUPT) document with Six Nations (SNGR)</li> <li>• Develop a communications plan for sacred fires protocol</li> <li>• Consult on City-led projects where appropriate</li> </ul>	Economic Development  Fire Rescue Services  Planning  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	x
	Meet with First Nations communities to begin building relationships and working together in to advance reconciliation and build sustainable relationships <ul style="list-style-type: none"> <li>• Six Nations of the Grand River</li> <li>• Mississaugas of the Credit First Nation</li> </ul>	Community Programming and Outreach Services	x	x	x

		<p>Economic Development</p> <p>Legislative Services, Information Security and Privacy</p> <p>Planning</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>			
	<p>Promote free commissioning services to Indigenous peoples</p> <ul style="list-style-type: none"> <li>Explore additional opportunities to remove barriers</li> </ul>	Legislative Services, Information Security and Privacy		x	x
	<p>Delegations received by Council from First Nations' communities</p> <ul style="list-style-type: none"> <li>Education Workshop on Land Use Planning by Six Nations of the Grand River's Consultation and Accommodation Process Team</li> </ul>	<p>Legislative Services, Information Security and Privacy</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>		x	

<b>1.4</b> Honour, support, and celebrate Indigenous cultures, by collaborating alongside Indigenous Elders, Knowledge keepers, leaders, artists and creators, and communities on projects and programs that benefit Indigenous communities.	Establish Indigenous gathering spaces <ul style="list-style-type: none"> <li>• Ongoing work with University of Waterloo</li> <li>• Ongoing assessments of available land</li> </ul>	Economic Development  Parks, Forestry and Cemetery Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	x
	The Arts and Creative Industries team will continue to: <ul style="list-style-type: none"> <li>• Include Indigenous artists in programming</li> <li>• Create low barrier opportunities for participation for Indigenous artists</li> <li>• Invite Indigenous-led organizations, collectives, informal groups and individuals to participate in event and artist opportunities</li> </ul>		x	x	x
	Museum & Archival Collections collaborates with Indigenous-led organizations and artists to develop and participate in Museum exhibitions <ul style="list-style-type: none"> <li>• Policies and collecting practices acknowledge the importance of ethical stewardship of Indigenous objects, including objects that fit within City's collections scope to represent other histories of Waterloo (policy updated in 2022)</li> </ul>	Community Programming and Outreach Services	x (started in 2024)	x	x

<p><b>1.5</b></p> <p>Develop a Reconciliation Strategy and Implementation Plan for the City of Waterloo that focuses on addressing the TRC's Calls to Action, the MMIWG Calls to Justice, and the UNDRIP.</p>	<p>Council Report: City of Waterloo Response to the Truth and Reconciliation Commission Calls to Action (2019)</p> <ul style="list-style-type: none"> <li>• Report identified actions that can be taken at the City to begin this journey of Reconciliation</li> <li>• Identified an action plan that corresponds to the calls to action of the TRC</li> <li>• Outlined the importance of adopting and using a territorial acknowledgement as an act of Reconciliation</li> <li>• Report underscored that undertaking these actions should be seen as a beginning, not an end to the process of developing mutually respectfully relationships between Indigenous and non-Indigenous peoples</li> </ul>	Community Programming and Outreach Services	X (2020: Council report proposed region-wide Reconciliation Action Plan)		
	<p>Reconciliation Action Partnership (RAP): <i>A Pathway Forward</i> (municipal partners' strategy)</p> <ul style="list-style-type: none"> <li>• Staff contributed to development of <i>A Pathway Forward</i>.</li> <li>• Staff involved in developing and executing an implementation plan through participation in RAP sub-committees.</li> </ul>	<p>All Divisions</p> <p>Community Programming and Outreach Services</p> <p>Corporate Communications</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>	X	X Adopted RAP's strategy	X Implement goals identified in RAP's strategy

City of Waterloo Strategic Plan (2023-2026):

- Objective 1: Invest in accessibility and inclusion to enhance belonging
- Objective 2: Embed Reconciliation, equity, accessibility, diversity and inclusion across the organization

**Get READI Plan (2025-2030) priority area 2: Enhance the built environment**

Goal	Action(s)	Team:	Complete before December 2024	Completed in 2025	Not started: Indicate anticipated start date, funding estimate and source
<b>2.1</b> Work towards a funding plan to upgrade interior spaces to be accessible and inclusive for all community members.	Accessibility Facility Upgrades funding secured <ul style="list-style-type: none"> <li>• Approx. \$690k each year, for the next 10 years</li> </ul>	Facility Design and Management Services  Financial Planning & Asset Management  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	x
	Capital projects completed in collaboration with the Grand River Accessibility Advisory Committee: <ul style="list-style-type: none"> <li>• Installation of universal washrooms at City Hall, RIM Park/East side Library, Waterloo Memorial Recreation Complex</li> <li>• Installation of adult change tables at Heritage Green, City Hall, RIM Park/East side Library, Waterloo Memorial Recreation Complex</li> <li>• Installation of tactile wayfinding to support people with low/no vision impairments at Heritage Green, City Hall, RIM Park/East side</li> </ul>	Corporate Communications  Facility Design and Management Services  Financial Planning & Asset Management	x	x	x



Library, Waterloo Memorial Recreation Complex, Albert McCormick Community Centre, Button Factory and Moses Springer Community Centre	Parks, Forestry and Cemetery Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion			
Capital projects being planned: <ul style="list-style-type: none"> <li>• Updates to Council Chambers to improve accessibility</li> <li>• Planned universal washrooms for Albert McCormick Community Centre, Button Factory and Moses Springer Community Centre</li> <li>• Planned adult changing table for Albert McCormick Community Centre, Button Factory and Moses Springer Community Centre</li> </ul>	Corporate Communications  Facility Design and Management Services  Financial Planning & Asset Management  Legislative Services, Information Security and Privacy  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		X (Partnered with Adventure 4 Change and House of Friendship to support use of renovated AMCC for the communities they service, and with other community partners connected to the Lakeshore South Neighbourhood)	X
Construction Coordinator role to advance accessibility at city facilities	Facility Design and Management Services		X	X
Ongoing upgrades to existing facilities (e.g. installed automated soap dispensers, improved locking mechanism in universal washrooms)	Community Programming and Outreach Services  Recreation Services	X	X	X

<p><b>2.2</b></p> <p>Work towards a funding plan to upgrade exterior spaces to be accessible and inclusive for all community members.</p>	<p>Re-purpose the municipal right-of-way (e.g. bike lanes, multi-use trails and wider sidewalks) where possible</p> <ul style="list-style-type: none"> <li>To encourage multi-modal forms of transportation</li> <li>To provide barrier free pathways on roads and in city parks, wherever possible</li> <li>While balancing space needs to grow the city's tree canopy to address increasing concerns regarding extreme heat and urban heat island effects, and to align with the City's climate adaptation and resiliency goals</li> </ul>	<p>Engineering Services</p> <p>Parks, Forestry and Cemetery Services</p>	X	X	X Road improvements through reconstruction are completed annually
	<p>Table maintenance program</p> <ul style="list-style-type: none"> <li>Introducing more accessible picnic tables to City parks</li> <li>Neighbourhood picnic table program showcases diverse artists from across Waterloo Region. This program also helps increase accessible seating inventory in neighbourhood parks with new tables purchased annually.</li> </ul>	<p>Community Programming and Outreach Services</p> <p>Economic Development</p> <p>Parks, Forestry and Cemetery Services</p>	<p>X</p> <p>(Neighbourhood picnic table program began in 2020)</p>	X	X
	<p>Infrastructure improvements:</p> <ul style="list-style-type: none"> <li>Enhancing multi-use pathways and trails</li> <li>Improving and enhancing winter sidewalk snow clearing</li> <li>Installing more lighting on trails and pathways</li> <li>Repairing sidewalks and curbsides</li> <li>Redesigning and constructing infrastructure to AODA standards where feasible</li> </ul>	<p>Community Programming and Outreach Services</p> <p>Engineering Services</p> <p>Facility Design and Management Services</p> <p>Municipal Enforcement Services</p>		X	X There will be additional enhancements including snow lifting from curb faced sidewalks

	Parks, Forestry and Cemetery Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion  Transportation Services			
Accessibility reviews with Accessibility Advocate: <ul style="list-style-type: none"> <li>• <b>Fountain in Waterloo Uptown Square</b></li> <li>• <b>Laurel Greenway Feasibility Study:</b> outlines an exciting vision, concept and approach to develop the Laurel Greenway, a nearly two-kilometre-long linear park running through Uptown Waterloo, from Waterloo Park to Weber Street.</li> <li>• <b>Uptown Public Realm Study:</b> Strategy proposes a connected urban landscape that provides a range of great places for social interaction. It will ensure that growth and development take place within a high-quality, inviting, and vibrant public realm— the key to creating a thriving and active Uptown.</li> <li>• Uptown Business audits and mapping</li> </ul>	City Utilities  Economic Development (& Uptown Waterloo Business Improvement Area (BIA)) Engineering Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	X Future projects recommended through these studies will be reviewed with the Accessibility Advocate
Improve inclusive gathering spaces in Waterloo Public Square <ul style="list-style-type: none"> <li>• Purchase new furnishings that provide dedicated space for mobility devices at tables</li> <li>• Provide shade structures in the public square to provide shelter during hot and inclement weather</li> </ul>	Economic Development  Engineering Services	x		x
Trail improvements	Engineering Services	x	x	x

<ul style="list-style-type: none"> <li>Install trails and trailhead areas to increase connectivity and activate underutilized areas to support gathering places for all residents</li> </ul>	Transportation Services			This is completed annually
Updating Disabled Parking Bylaw and signage of designated parking spaces for people with disabilities	Municipal Enforcement Services		x	
Improved visual signage for building entrances at Waterloo Memorial Recreation Center and Community Pavillion	Community Programming and Outreach Services		x	
An accessible and gender-neutral washroom at Waterloo Park	Parks, Forestry and Cemetery Services			X Request in 2027 budget
Non-verbal Communication Board installation in Waterloo Park	Parks, Forestry and Cemetery Services		x	
Improve wayfinding in Waterloo Parks -install signage in Braille and additional accessibility components	Parks, Forestry and Cemetery Services		x	x
Updating 2024-2026 budgets: <ul style="list-style-type: none"> <li>Asset management policy and asset management strategy to be more inclusive</li> <li>Increased capital funding as part of capital budget</li> </ul>	Facility Design and Management Services  Financial Planning & Asset Management  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x		x

<b>2.3</b> Continuously assess the needs of the built environment, ensuring that proactive actions are taken to meet complex needs of the broad spectrum of disabilities.	Improve software systems <ul style="list-style-type: none"> <li>To better support multiple languages internally and externally, including a website that supports translation functions</li> </ul>	Corporate Communications  Information Management and Technology Services		X	X
	City of Waterloo Museum website provides accessible information about current exhibitions and related activities	Community Programming and Outreach Services		X	X
	City of Waterloo Museum exhibit designs incorporate accessibility considerations, including accommodations for visitors using mobility aids, supports for low vision, magnification tools, large-print text, closed captioning, and tactile engagement opportunities	Community Programming and Outreach Services	X (started in 2023)	X	X
	Digital Service Strategy establishes digital standards that ensure all materials meets resident needs <ul style="list-style-type: none"> <li>Trial conversion of the Comprehensive Engineering Landscape Manual (CELM) to html to support conversions of documents to more accessible formats</li> </ul>	Corporate Communications  Engineering Services		X	X
	Accessibility standards: <ul style="list-style-type: none"> <li>Formalize AODA guidelines for City of Waterloo construction projects in interior and exterior space</li> <li>Considering standards beyond the Ontario Building Code that enhance inclusiveness and accessibility for City of Waterloo projects</li> </ul>	Engineering Services  Facility Design and Management Services  Parks, Forestry and Cemetery Services  Planning  Reconciliation, Equity, Accessibility,	X (drafting)	X (drafting)	X

	Diversity, and Inclusion			
	Transportation Services			
Engage Grand River Accessibility Advisory Committee on projects and initiatives	All Divisions	x	x	x
Considering equipment requirements to better support individuals with disabilities during emergency calls	Fire Rescue Services		x	x
Update Public Art Policy <ul style="list-style-type: none"> <li>• Include accessibility best practices for future interior public art installations</li> <li>• Include accessibility best practices for future exterior public art installations</li> </ul>	Economic Development			x
Integrate Accessibility program elements under the City's Uptown Community Investment Program <ul style="list-style-type: none"> <li>• Encourage business owners to improve the interior and exterior accessibility of their building façades</li> </ul>	Economic Development			x
Service Centre Open House Pilot <ul style="list-style-type: none"> <li>• Develop an event Accessibility Plan</li> </ul>	City Utilities			x
Audio improvements that support individuals who are Deaf and/or hard of hearing <ul style="list-style-type: none"> <li>• At service counters and meeting rooms across City facilities</li> <li>• Hearing Loops at City Hall</li> <li>• Installation of meeting room OWLs to support hybrid capacities for meetings and more inclusive meeting</li> </ul>	Community Programming and Outreach Services  Corporate Communications  Facility Design and Management Services  Financial Planning & Asset Management		x	

	<p>Legislative Services, Information Security and Privacy</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>			
<p>Accessibility training: in collaboration with the Grand River Accessibility Advisory Committee</p> <ul style="list-style-type: none"> <li>To Council and senior leadership to promote built environment needs</li> <li>For volunteers</li> </ul>	<p>Community Programming and outreach Services</p> <p>Legislative Services, Information Security and Privacy</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>		x	x
<p>Staff learning opportunities:</p> <ul style="list-style-type: none"> <li>Ceiling track-lift installation</li> <li>The Abilities Centre tour to learn more about inclusive recreation offerings, including space, equipment, and programs</li> <li>Sensory room tours to understand design and implementation concepts, funding requirements</li> <li>Barriers in the built environment: Uptown Waterloo, Waterloo Memorial Recreation Centre, RIM Park</li> </ul>	<p>Community Programming and Outreach Services</p> <p>Facility Design and Management Services</p> <p>Reconciliation, Equity, Accessibility,</p>	x	x	x

	Diversity, and Inclusion			
	Recreation Services			
Neighbourhood summit <ul style="list-style-type: none"> <li>Focused on accessibility and inclusivity in neighbourhood community building</li> </ul>	Community Programming and Outreach Services		x	
Washroom audits of facilities in parks <ul style="list-style-type: none"> <li>To understand state of use by community and accessibility needs</li> <li>Results added to prioritization list for future projects</li> </ul>	Facility Design and Management Services  Parks, Forestry and Cemetery Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x (audit completed)		x
Explore options to demonstrate eligibility for the PAL (Personal Assistant for Leisure) Card to help limit the number of times residents with disabilities need to demonstrate their disability status	Community Programming and Outreach Services			x



City of Waterloo Strategic Plan (2023-2026):

- Objective 1: Invest in accessibility and inclusion to enhance belonging
- Objective 2: Embed Reconciliation, equity, accessibility, diversity and inclusion across the organization
- Objective 3: Advance Reconciliation
- Objective 4: Action anti-racism

**Get READI Plan (2025-2030) priority area 3: Cultivate a culture of belonging**

Goal	Action(s)	Team:	Complete before December 2024	Completed in 2025	Not started: Indicate anticipated start date, funding estimate and source

<b>3.1</b> Develop, promote, and/or evaluate free/low cost, accessible, inclusive, age-friendly public spaces for equity-denied community members.	Seek grants to support community programming: <ul style="list-style-type: none"> <li>Example: Federal Grant for Newcomer Translation - translated materials to into 7 languages</li> </ul>	Community Programming and Outreach Services  Financial Planning & Asset Management			
	Sports and Recreation grant <ul style="list-style-type: none"> <li>Revised and funding increased (2023)</li> <li>Supports broad range of sport and recreation opportunities reaching a range of demographics</li> </ul>	Community Programming and Outreach Services	x	x	x
	Sports and Recreation Strategy	Community Programming and Outreach Services  Facility Design and Management Services  Parks, Forestry and Cemetery Services  Recreation Services		x (draft)	X (will have public engagement)
	Cricket Strategy <ul style="list-style-type: none"> <li>Advancing development of a Cricket Strategy to support the city to better respond to the rapid growth in community interest in cricket</li> </ul>	Community Programming and Outreach Services	x (started in 2024)	x (Opened 3 <sup>rd</sup> Cricket Pitch to accommodate growing community interest)	x (anticipate strategy completion)
	Indoor Community Space Strategy <ul style="list-style-type: none"> <li>Includes a range or recommendations related to accessibility and making recreation facilities more welcoming</li> </ul>	Community Programming and Outreach Services	x	x	x
	Free use of space pilot program <ul style="list-style-type: none"> <li>Focused on providing free access to grassroots community organizations and equity-denied community groups</li> </ul>	Community Programming and Outreach Services  Recreation Services		(Drafting)	x (pilot)
	City of Waterloo Museum promotes and offers free space for community groups to celebrate and share their history in	Community Programming and Outreach Services	x (started in 2024)	x	x

	Waterloo through our community case initiative				
	<p>Offering spaces for residents to gather</p> <ul style="list-style-type: none"> <li>Free services, such as the walking/running track at the Waterloo Recreation Complex</li> <li>Recreation facilities offer rental and programming spaces</li> <li>Creation of prayer and feeding spaces at City Hall and Albert McCormick Community Center</li> </ul>	<p>Community Programming and Outreach Services</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p> <p>Recreation Services</p>		x	x
	<p>Arts Grant program</p> <ul style="list-style-type: none"> <li>Provides funds to arts-based organizations for project, capital, and operating costs</li> </ul>	Economic Development	x	x	x
	Offer bookable space at Waterloo Public Square and the Visitor Information Centre at reduced or no cost to non-profits and arts organizations	Economic Development	x	x	x
	<p>Develop an Urban Forestry Management Strategy (in progress)</p> <ul style="list-style-type: none"> <li>Include an equity component</li> <li>Review tree canopy in the city and target areas of the city where there is a high density of populations most vulnerable to climate change impacts</li> </ul>	Parks, Forestry and Cemetery Services		x	x
	<p>Neighbourhood naming program</p> <ul style="list-style-type: none"> <li>Promotes a sense of belonging and connections with neighbours</li> <li>Neighbourhoods without a formal name are less likely to have neighbourhood associations/groups and related community building</li> </ul>	Community Programming and Outreach Services	x (pilot: pop up events in select areas)	x	x (shift away from naming to community building)

<b>3.2</b> In partnership with Indigenous leaders, Knowledge keepers, and communities, provide permanent spaces that promote the wellbeing and safety of Indigenous communities.	Sacred Fires protocol (pilot) <ul style="list-style-type: none"> <li>Identifies designated spaces in Waterloo to host Sacred Fires</li> <li>Ensure staff are educated on the protocol</li> </ul>	Fire Rescue Services  Municipal Enforcement Services  Parks, Forestry and Cemetery Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		X	X Pilot
	Council Report: Indigenous Reconciliation Action Plan – the Plan Forward (2020) <ul style="list-style-type: none"> <li>Meeting/gathering spaces available to Indigenous community at no cost</li> </ul>	Community Programming and Outreach Services Parks, Forestry and Cemetery Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion  Recreation Services	X Launched in 2021	X	X
<b>3.3</b> Identify and remove barriers that prevent participation of equity-denied groups in municipal-led programming.	Inclusive community programming, spaces, and events <ul style="list-style-type: none"> <li>Provide 1:1 inclusion support service to enable participation in programming</li> <li>Provide social prescribing programs to reduce barriers to participation (e.g. transportation, cost)</li> <li>Removing barriers to registration/ participation in programs and events</li> </ul>	Community Programming and Outreach Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		X	X
	Introduced Sensory backpacks in City facilities <ul style="list-style-type: none"> <li>Specifically designed for individuals with sensory processing disabilities, sensory sensitivities or other needs</li> </ul>	Community Programming and Outreach Services		X	X
	Increased the Fee Assistance credit from \$300 to \$400 per person per year to better	Community Programming and Outreach Services	X (increased credit)	X	X

	meet the needs of residents living with a low income				
	Supporting Dietary Needs Guide (draft) <ul style="list-style-type: none"> <li>To guide City in providing inclusive dietary options to meet community-wide dietary needs</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion  Recreation Services		X under development	x
	Meeting and Events Hosting Guide: A Tool for Accessibility, Inclusivity, Sustainability (draft) <ul style="list-style-type: none"> <li>Guide City in hosting a variety of events that are inclusive, accessible and sustainable</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion  Strategic Initiatives		X under development	x
	Volunteer Community Ambassador position <ul style="list-style-type: none"> <li>To provide opportunities for community members to contribute to Reconciliation, Equity, Accessibility, Diversity and Inclusion efforts at the City</li> </ul>	Human Resources  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	x
	Hidden Disabilities Sunflower Program <ul style="list-style-type: none"> <li>Sunflower lanyards as a tool to help individuals self-identify the need for additional supports in City facilities</li> <li>Collaborating with Grand River Accessibility Advisory Committees</li> </ul>	City Utilities  Community Programming and Outreach Services  Corporate Communications  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		X Internal teams are learning more	X Launch in spring
	Welcome Ambassador at the Community Pavilion <ul style="list-style-type: none"> <li>To support members of the public with being welcomed at the facility and finding needed resources</li> </ul>	Human Resources  Community Programming and Outreach Services			
	Update website for greater public awareness so residents can easily find resources and information about the City	Corporate Communications		x	
	Black Entrepreneur Market	Economic Development	x		

Get READI Benchmarking and Implementation Plan | 22

	<ul style="list-style-type: none"> <li>To provide supports to small business owners to market their services and products</li> </ul>	(Small Business Centre)			
	<p>On-demand interpretation services provided through Video Remote Interpretation</p> <ul style="list-style-type: none"> <li>To effectively communicate with Community members for whom English is not a primary language and with community members who are deaf or hard of hearing</li> </ul>	All Divisions	x	x	x
	<p>Committee review of Advisory Committees to Council</p> <ul style="list-style-type: none"> <li>Staff are assessing barriers to participation</li> <li>Also looking at ways to address barriers, including a review of the council remuneration pilot project and the honoraria policy</li> </ul>	Legislative Services, Information Security and Privacy		x	
	<p>Promote the use of more plain language in staff reports that explain bylaws</p> <ul style="list-style-type: none"> <li>Including same information on City's website</li> </ul>	<p>Building Standards</p> <p>Community Programming and Outreach Services</p> <p>Corporate Communications</p> <p>Legislative Services, Information Security and Privacy</p>		x	x
	<p>Replaced gendered signage for washrooms with inclusive signage</p> <ul style="list-style-type: none"> <li>To communicate all gender washrooms</li> </ul>	Community Programming team and Outreach Services		x Pilot	x
	<p>Free programming</p> <p>20+ programs promoting Days of Significance in June:</p> <ul style="list-style-type: none"> <li>Seniors in the city picnic</li> <li>Bike repair program</li> </ul>	<p>Community Programming and Outreach Services</p> <p>Recreation Services</p>		<p>x</p> <p>Over 850 participants in this first year!!</p>	x

	<ul style="list-style-type: none"> <li>• A journey through Indigenous cuisine</li> <li>• Adult skate</li> <li>• Adult swim</li> <li>• Friday Flicks</li> <li>• Trans only swim</li> <li>• Women only swim</li> <li>• Yoga for 2SLGBTQIA+ people</li> </ul> <p>Empowered Learners (education)</p> <p>Age Friendly Tech</p> <p>Without Walls program</p> <p>Seasonal Concerts</p> <p>Exploring Worldwide Art Forms</p> <ul style="list-style-type: none"> <li>• Celebrates the diversity of ethnocultural communities in Waterloo Region</li> <li>• Workshop welcomes individuals learn in an intergenerational environment</li> </ul> <p>Days of significance events</p> <p>Free hearing screening with Hear Canada</p>				
	Daytime leadership swim program offered at no cost to community members aspiring to be a lifeguard. Courses and certification included.	Recreation Services			
	<p>Use of pronouns</p> <ul style="list-style-type: none"> <li>• Through pronoun buttons to normalize sharing of pronouns at children's camp programs</li> <li>• Optional pronouns identification on Microsoft Teams</li> </ul>	<p>Community Programming and Outreach Services</p> <p>IT Services</p>		x	x
	Sensitive Santa initiative	Community Programming and Outreach Services	x	x	x

	<ul style="list-style-type: none"> <li>Offering Santa visits in a sensory friendly environment (e.g. dim lights) for children and youth</li> </ul>				
	Host community focus groups to gather (more) information <ul style="list-style-type: none"> <li>On inclusion and accessibility</li> <li>User testing of snow removal applications related to accessibility</li> <li>To build a sensory room</li> </ul>	Community Programming and Outreach Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		x	
	Accessibility and Inclusion Ranking Criteria Document <ul style="list-style-type: none"> <li>Initiated to develop criteria to assess accessibility features of municipal led programs</li> <li>To effectively communicate to the public how accessible programming is</li> </ul>	Community Programming and Outreach Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x Report drafted	x Led to sensory backpacks;  Let to Try It program report	
	City-assisted snow clearing program	Community Programming and Outreach Services  Financial Planning & Asset Management  Municipal Enforcement Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	x
	Improve programing <ul style="list-style-type: none"> <li>Added women's only swim programs, women's only fitness classes, and women's only shinny hockey to remove barriers for women to attend recreational programming</li> <li>Expanding adapted aquatics program to teens in 2015 and adults in 2022, and</li> </ul>	Recreation Services		x	x



	<p>increased the number of participants that can register for the program</p> <ul style="list-style-type: none"> <li>Extended changeroom timing availability (after swim programs) to allow participants with disabilities increased flexibility when using facilities</li> </ul> <p>Low/no cost youth programming including:</p> <ul style="list-style-type: none"> <li>AMCC/WMRC: “Pick your Play” program for 8 – 12 year olds</li> <li>WMRC: Youth Drop in Basketball, 13 – 17 year olds</li> <li>Moses Springer Community Centre: Swim to Survive for Children ages 7 – 12</li> </ul>				
	<p>Seasons of Many holidays banners</p> <ul style="list-style-type: none"> <li>To celebrate holidays, days of significance for equity-denied groups</li> <li>To raise awareness amongst staff</li> <li>Put up in December; remain up until end of February</li> <li>City of Waterloo Museum social media content reflects a community-centered approach, highlighting and celebrating diverse cultural holidays and groups</li> </ul>	<p>Community Programming and Outreach Services</p> <p>Corporate Communications</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>	<p>X (started in 2023)</p>	<p>X Updated banners;  Became digital screens</p>	<p>X</p>
	<p>Prioritize inclusion of artists from diverse and intersectional identities in programming</p>	<p>Economic Development</p>	<p>X</p>	<p>X</p>	<p>X</p>
	<p>Lower barriers to applications for open calls and other paid artist opportunities</p>	<p>Economic Development</p>	<p>X</p>	<p>X</p>	<p>X</p>
	<p>Tenant information package being developed along Rental Housing Licensing Bylaw update</p> <ul style="list-style-type: none"> <li>Information package will be translated into multiple languages</li> </ul>	<p>Municipal Enforcement Services</p>		<p>X</p>	<p>X</p>

	<p>Review requirements for accessible elections, report on and train election workers.</p> <ul style="list-style-type: none"> <li>• Complete an accessibility audit of all voting locations</li> <li>• Review opportunities to mitigate barriers, including but not limited to, voting location supplies, voting equipment such as audio ballot marker, voyce app, promoting super vote locations with additional equipment and supports, etc</li> </ul>	Legislative Services, Information Security and Privacy		x	
	<p>Provide event equipment to residents organizing neighbourhood-led initiatives in Waterloo.</p> <ul style="list-style-type: none"> <li>• Equipment is provided with no fee, removing financial barriers for event organizers</li> <li>• Program uses an online form for intake, and a PDF that is screen reader friendly</li> <li>• Event equipment also helps the initiatives be more accessible by providing pop-up tents for those who need shade, folding chairs for those who need to sit , and microphones for those who have hearing impairments</li> </ul>	Community Programming and Outreach Services	x	x	x
	<p>Modification of employee new hire form</p> <ul style="list-style-type: none"> <li>• Include pronouns</li> <li>• Inclusion of pronouns on photo ID cards for staff</li> </ul>	Human Resources	x (completed)		
	Diversify stock photos used by the City	<p>Corporate Communications</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>	x	x	

<b>3.4</b> Partner with community organizations to expand, adapt, and increase awareness of programs and resources that support equity-denied community members.	Utilize neighbourhood e-newsletter as a way to increase community awareness on READI (ex. CCDI calendar) <ul style="list-style-type: none"> <li>Highlight examples or resources that neighbors can use for inspiration and reflection to support equitable neighborhoods/communities</li> </ul>	Community Programming and Outreach Services	x (2023)	x	x
	Leverage City website (Neighbourhoods section) to highlight examples and resources for residents to use as inspiration or for reflection <ul style="list-style-type: none"> <li>To support equitable neighborhoods/communities</li> </ul>	Community Programming and Outreach Services	x	x	x
	<i>Supporting and Encouraging an Inclusive Community</i> <ul style="list-style-type: none"> <li>A neighbourhood guide</li> <li>Provides suggestions on how to foster inclusion in neighbourhoods by identifying what makes neighbourhoods inclusive and actionable steps community members can take</li> <li>Support neighbourhood associations with resources and guidance to host inclusive events and activities (examples: connecting to local organizations and/or social services, translation of materials, inclusive event planning)</li> </ul>	Community Programming and Outreach Services	x (2024)	x	x
	Explore social procurement opportunities <ul style="list-style-type: none"> <li>Undertake low cost purchases to support local community businesses/service providers where possible based on purchase requirements</li> <li>Continue to monitor availability of products and services available from equity denied groups</li> </ul>	All Divisions  Fleet & Procurement Services	x	x	x

	Connect newcomer Canadians to appropriate business startup resources	Economic Development (Small Business Centre)			X
	<p>Emergency Services Career Camp</p> <ul style="list-style-type: none"> <li>An annual, 2-day, joint camp experience with Waterloo Fire Rescue, Waterloo Regional Police Services and Region of Waterloo Paramedic Services</li> <li>Has grown into a transformative experience designed to challenge and empower youth for a future as a first responder</li> <li>Focus on youth from diverse backgrounds and equity-denied communities</li> </ul>	<p>Fire Rescue Services</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>	X (launched in 2022)	X	X
	<p>Waterloo Fest</p> <ul style="list-style-type: none"> <li>In partnership with local post-secondary schools, welcome new students into Waterloo</li> <li>Bring in local organizations that students can gain support from</li> </ul>	<p>All Divisions</p> <p>Community Programming and Outreach Services</p>	X	X	X
	<p>Leverage partnerships to improve communication, education and engagement</p> <ul style="list-style-type: none"> <li>To address parking concerns around mosque through relationship with Imam</li> <li>To share information on various programs, services, and upcoming dates/events</li> <li>By collaborating with Adventure 4 Change and House of Friendship for youth participation in Youth leadership development program (2024)</li> <li>By collaboration with REEP Green Solutions to support efforts on energy poverty and to conduct an energy vulnerability assessment for Waterloo</li> </ul>	<p>Community Programming and Outreach Services</p> <p>Economic Development</p> <p>Legislative Services, Information Security and Privacy</p> <p>Municipal Enforcement Services</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p> <p>Recreation Services</p>		X	X

	<ul style="list-style-type: none"> <li>• By collaborate with Immigration Partnership on newcomer focus to access to services and employment programs</li> <li>• To provide training on Patkas to support Sikh youth in City programming</li> </ul>	Strategic Initiatives			
	<p>Created a Letter of Understanding template</p> <ul style="list-style-type: none"> <li>• To offer high-quality, unique, and inclusive programs and services for equity-denied older adults</li> <li>• In partnership with independent groups or agencies in the community</li> <li>• An expressed commitment to inclusive program names and plans, use of gender-neutral language, and offering accommodations to meet accessibility needs</li> </ul>	Community Programming and Outreach Services		x	
	<p>Greater connectivity with 2SLGBTQIA+ organizations and collaboration with SPECTRUM to provide tailored programming for 2SLGBTQIA+ community members at City spaces.</p> <ul style="list-style-type: none"> <li>• Trans Swim programming</li> <li>• Inclusive Yoga programming</li> <li>• Use of Activity Course and Ball diamonds</li> <li>• Lending equipment (cricket) to support programming</li> </ul>	Recreation Services		x	
	<p>Host annual event for Elder Abuse Awareness Day</p> <ul style="list-style-type: none"> <li>• Partnered with Elder Abuse Prevention Council and Waterloo Region Police Services</li> </ul>	Community Programming and Outreach Services	x	x	x
	Neighbourhood Services run community events and or initiatives	Community Programming and Outreach Services	x	x	x

	<ul style="list-style-type: none"> <li>Offer support with childcare, transportation, translation, and dietary needs</li> </ul>				
	Review opportunities to provide no-cost commission services for certain documents <ul style="list-style-type: none"> <li>Work with community organizations to promote those services</li> </ul>	Legislative Services, Information Security and Privacy		X	X
	Museum exhibition: <ul style="list-style-type: none"> <li>Seeking Home: the story of early Black settler Levi Carroll</li> </ul>	Community Programming and Outreach Services		X	
	Museum actively partners with local community groups to recruit volunteers from diverse backgrounds, reflecting the community we serve	Community Programming and Outreach Services	X (started in 2023)	X	X
<b>3.5</b> Support region-wide efforts towards reduction in hate-based incidents through education and development of policies, frameworks, and/or guidelines to proactively address hate.	Update Respectful Behaviour Policy and procedures <ul style="list-style-type: none"> <li>To support staff in identifying and responding to discrimination and harassment in and on City facilities</li> </ul>	Legal Services, Information Security and Privacy  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		X	
	Membership on Regional Table: Combatting Hate Action Table	Reconciliation, Equity, Accessibility, Diversity, and Inclusion	X	X	X
	Region-Wide anti hate campaign <ul style="list-style-type: none"> <li>Support and participate in campaign</li> </ul>	Community Programming and Outreach Services  Corporate Communications  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		X (mini-launch events in Erb West neighbourhood)	X
	<i>Responding to Hate-Motivated Incidents</i> <ul style="list-style-type: none"> <li>A neighbourhood guide</li> </ul>	Community Programming and Outreach Services	X (2023)	X	X

	<ul style="list-style-type: none"> <li>Provides suggestions on how to address incidents of hate</li> <li>Provides information about community supports</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion			
	Investigate vexatious complaints made by members of the public that may be due to discriminatory biases	Municipal Enforcement Services			x
	Inform Waterloo Region Police Services when graffiti occurs on City premises	Municipal Enforcement Services	x	x	x
	International Day for the Elimination of Racial Discrimination event <ul style="list-style-type: none"> <li>Hosted by Immigration Partnership</li> <li>Participate and provide co-leadership representation</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	
	Neighbourhood grants <ul style="list-style-type: none"> <li>Support activities in neighbourhoods that bring all neighbours together, including celebration of a range of holidays at the neighbourhood level</li> <li>Prioritize projects that demonstrate Reconciliation, diversity, equity, and inclusion in planning and organizing neighbourhood-led ideas through grant policy and review</li> </ul>	Community Programming and Outreach Services	x	x	x

City of Waterloo Strategic Plan (2023-2026):

- Objective 1: Invest in accessibility and inclusion to enhance belonging
- Objective 2: Embed Reconciliation, equity, accessibility, diversity and inclusion across the organization

**Get READI Plan (2025-2030) priority area 4: Reflect diversity in staff and leadership**

Goal	Action(s)	Team:	Complete before December 2024	Completed in 2025	Not started: Indicate anticipated start date, funding estimate and source
<b>4.1</b> Work with Council and leadership to provide training on READI principles with the intention of reducing harmful biases, perceptions, and worldviews that impact equity-denied community members.	Training offered by the READI team at City of Waterloo: <ul style="list-style-type: none"> <li>• Learning Days</li> <li>• Canadian Centre for Diversity and Inclusion webinars</li> <li>• Learning Management System (LMS) training offerings with reflection opportunities</li> <li>• Coordinated Rainbow 101 training</li> </ul>	All Staff  Fire Rescue Services  Recreation Services	x	x	x
	Enhanced training for Human Resources team <ul style="list-style-type: none"> <li>• Effective alternative dispute resolution/mediation/workplace restoration</li> <li>• Microaggressions, trauma-informed investigations, identity based harm, etc.</li> </ul>	Human Resources		x	x
	Training to enhance inclusivity across programming: <ul style="list-style-type: none"> <li>• Unconscious Bias training (2022)</li> <li>• Step Training (deescalation and dealing with conflict in the community) (2024)</li> <li>• Behaviour 101 training: improve knowledge about behaviour, functions of behaviour, and calming techniques (2025)</li> <li>• Training for snow removal contractors to better understand accessibility needs impacted by snow and ice</li> </ul>	Community Programing and Outreach Services  Municipal Enforcement Services	x	x	x
	Further leadership development to better equip leaders to address/support conflict (2026 work plan)	Human Resources		x	x



	<ul style="list-style-type: none"> <li>Course: <i>The Impact of Inaction: Strengthening Leadership Accountability</i></li> </ul>				
	Learning opportunities for Council and Senior Leaders <ul style="list-style-type: none"> <li>Series of 4 intensive sessions (monthly)</li> <li>Develop personal statements of commitment</li> <li>Develop customized tools for decision making</li> </ul>	Legislative Services, Information Security and Privacy  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		x	x
	Statements for days of recognition/significance <ul style="list-style-type: none"> <li>Councillors personalize and read at Council meetings</li> <li>Included in outgoing communications</li> <li>Leverage intranet to raise staff awareness about days of recognition</li> </ul>	Corporate Communications  Legislative Services, Information Security and Privacy  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		x	x
<b>4.2</b> Support Council and leadership to build and enhance meaningful connections with equity-denied communities.	Host Mayor's Community Conversation on READI <ul style="list-style-type: none"> <li>Inform and collect feedback on READI initiatives with equity-denied community members</li> </ul>	Corporate Communications  Office of the CAO  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	
	Interfaith Calendar <ul style="list-style-type: none"> <li>Review when setting council schedule</li> <li>To mitigate holding meetings on days of significance that would hinder public participation</li> </ul>	Legislative Services, Information Security and Privacy	x	x	x
	Support Council participation in events/conferences and in developing letters of support to grow connections with equity-denied communities	Legislative Services, Information Security and Privacy	x	x	x
	City of Waterloo Museum exhibitions and programming take an inclusive approach to research and presentation, centering untold or underrepresented histories	Community Programing and Outreach Services	x (started in 2023)	x	x

	Host community budget session <ul style="list-style-type: none"> <li>To offer more opportunity for resident feedback in a hybrid manner (virtual and in-person participants)</li> <li>Have streamlined for plain language</li> <li>Also supports participation by providing onsite child care and reimbursement for transit service</li> </ul>	Corporate Communications  Financial Management & Asset Management	x	x	x
<b>4.3</b> Review and reconstruct the employment life cycle, where required, to remove barriers for equity-denied groups.	Review policies annually in consultation with employee groups	Human Resources	x	x	x
	Review uniform designs for more inclusive options	Community Programing and Outreach Services	x		
	Affinity Groups Program (pilot) <ul style="list-style-type: none"> <li>Intentional opportunity for employees to help affirm and support their shared identity, common interest, or shared experiences.</li> </ul>	Community Programming and Outreach Services  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		x Pilot of program	x
	Job Shadowing and Mentorship program <ul style="list-style-type: none"> <li>Internal staff volunteer to be mentors and are matched with staff requesting mentorship opportunities</li> </ul>	Human Resources	x	x	x
	Improving employee experience for greater inclusivity <ul style="list-style-type: none"> <li>Continuing to enhance return to work processes to be more supportive</li> <li>Attendance support program to proactively identify/implement supports</li> <li>Reviewing onboarding program to enhance supports for those whom English is not their first language</li> <li>Reviewing onboarding program for barriers to employment</li> <li>Development of Wellness Resources to highlight various supports available to employees</li> <li>Development and implementation of TransitShare Initiative (pilot)</li> </ul>	Human Resources  Strategic Initiatives	x	x	x
	Recruitment Best Practices & Considerations for Hiring Managers - Quick Reference Guide <ul style="list-style-type: none"> <li>Enhancing recruitment practices</li> </ul>	Human Resources	x	x	x

	<ul style="list-style-type: none"> <li>• Applying an equity lens to job postings</li> <li>• Embedding Reconciliation, equity and accessibility principals into interview questionnaires</li> <li>• Connecting with community organizations that support equity deserving groups in the region to put together a mailing list that City can send job postings to/notify of career fairs</li> </ul>				
	Staff Census and Survey <ul style="list-style-type: none"> <li>• Provided data comparing our demographic make-up to that of the community, as well as recommendations on how to work toward more proportional representation</li> <li>• To implement recommendations, several staff collaborated across a number working groups</li> </ul>	Human Resources Reconciliation, Equity, Accessibility, Diversity, and Inclusion	X 1 <sup>st</sup> in 2019; 2 <sup>nd</sup> in 2024		X TBD
	Demographic questionnaire to support diverse recruitment	Human Resources			X
<b>4.4</b> Enhance and promote leadership career advancement opportunities to increase diversity in management positions.					

City of Waterloo Strategic Plan (2023-2026):

- Objective 2: Embed Reconciliation, equity, accessibility, diversity and inclusion across the organization

**Get READI Plan (2025-2030) priority area 5: Focus on equitable distribution of resources**

Goal	Action(s)	Team:	Complete before December 2024	Completed in 2025	Not started: Indicate anticipated start date, funding estimate and source
<b>5.1</b> Expand opportunities for equity-denied groups to find meaningful employment throughout the Waterloo community.	<p>Exploring collaborations with community partners to support employment opportunities</p> <ul style="list-style-type: none"> <li>• Collaborating with KW Habilitation to better support hiring of individuals from this programming</li> <li>• Collaborating with Volunteer Waterloo Region to support interest in volunteering when applicants are not matched to criteria for City of Waterloo opportunities</li> <li>• Pilot with INNoVA to provide professional mentorship opportunities for individuals with disabilities</li> </ul>	<p>Community Planning and Outreach Services</p> <p>Human Resources</p> <p>Reconciliation, Equity, Accessibility, Diversity, and Inclusion</p>	x	x	x
<b>5.2</b> Advocate towards providing accessible and affordable housing options that enable movement for	<p>Leverage Inclusionary Zoning</p> <ul style="list-style-type: none"> <li>• Where inclusionary zoning policies apply, advocate for a greater percentage of units to meet universal design standards, not just affordability.</li> </ul>	Planning		x	x
	<p>Multi-unit Residential Acquisition (MURA) Program</p> <ul style="list-style-type: none"> <li>• Provide funding to non-profits to help them purchase existing affordable rental buildings</li> </ul>	Planning		x	x

people with disabilities.	<ul style="list-style-type: none"> <li>Prioritize projects that include VisitAble housing for people with permanent and temporary disabilities, older adults, those with strollers</li> </ul>				
	2025 University Avenue East project <ul style="list-style-type: none"> <li>Require 20% of units to be accessible</li> <li>Engage with Grand River Accessibility Advisory Committee to obtain feedback on accessibility features through site plan review and site visit</li> <li>Showcase approach to designing units for users with disabilities in mind</li> </ul>	Office of the CAO		x	x
	Affordable Rental Housing Grant Program <ul style="list-style-type: none"> <li>To foster the retention and construction of affordable housing for low to moderate income households, prioritizing applications that consider VisitAble design features</li> </ul>	Corporate Communications  Financial Management & Asset Management  Legal Services, Information Security and Privacy  Planning  Reconciliation, Equity, Accessibility, Diversity, and Inclusion	x	x	x

<b>5.3</b> Evaluate and expand availability and accessibility of interpretation services.	Review the effectiveness of on-demand interpretation services <ul style="list-style-type: none"> <li>Make recommendations to improve quality of interpretation supports, including ASL Interpretation</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion		X	X
<b>5.4</b> Explore, advocate for, and make available accessible and affordable resources that support aging in place.	Age-friendly initiatives: <ul style="list-style-type: none"> <li>Age-friendly Waterloo Advisory Committee transitioned from an arms-length multi-agency committee to an advisory committee to staff; this transition better supports the City to become more age-friendly, while actively involving older adults in the process</li> <li>Completed Age-friendly Action Plan to support Age-friendly activities/ implementation for 2025/2026</li> </ul>	Community Programming and Outreach Services	X (Committee launched in 2024)	X Began development of next Age Friendly Strategy for year 2027-2030	X
	Age Well At Home Program for Seniors and adults with disabilities, residing in Waterloo. <ul style="list-style-type: none"> <li>Service utilizes trained volunteers to provide outdoor maintenance take clients to medical appointments, grocery shopping and other essential need services, including social outings.</li> </ul>	Community Programming and Outreach Services	X	X	X Ageing Well Directory revision for 2026/27 to include additional resources
	Newcomer transportation program for seniors whereby trained volunteers take clients to medical appointments, grocery shopping and other essential need services, including social outings.	Community Programming team and Outreach Services			
	NORC (Naturally Occurring Retirement Communities) project to support aging in place and community building <ul style="list-style-type: none"> <li>Help volunteers in connected building to run events that meet their buildings needs. These events work to reduce social isolation and provide information</li> </ul>	Community Programming and Outreach Services		X Currently connect with 3 residential high-rise buildings in Waterloo, and in the process of expanding	X

	<p>on supports that can allow them to age in the right place. Some examples include information sessions on topics such as transportation, safety and emergency preparedness, financial planning, and social events such as walking groups, belly dancing, and carolling.</p> <ul style="list-style-type: none"> <li>NORC Community of Practice: between established NORC Programs, with hopes to expand as new NORC Programs are created. Helps facilitate connection between the NORC volunteers across the city. Promotes a sense of connection and belonging between volunteers and promotes collaboration as these volunteers help residents in their building age in community</li> </ul>				
	<p>Seniors Health Fair</p> <ul style="list-style-type: none"> <li>Hosted by the City, in partnership with the KW4 Ontario Health Team</li> <li>Senior Health Fair gives seniors and caregivers a chance to explore community programs that can help older adults stay healthy, active and connected</li> </ul>	Community Programming and Outreach Services	x	x	x
	<p>Book A Ride initiative</p> <ul style="list-style-type: none"> <li>Digital service to support older adults with booking a ride to appointments</li> </ul>	Community Programming and Outreach Services Corporate Communications	x	x Online booking now available	x
	Ride a Bus program to support older adults to learn use of transit	Community Programming and Outreach Services		x	x

City of Waterloo Strategic Plan (2023-2026):

- Objective 1: Invest in accessibility and inclusion to enhance belonging
- Objective 2: Embed Reconciliation, equity, accessibility, diversity and inclusion across the organization

**Get READI Plan (2025-2030) priority area 6: Build trust through systems of accountability**

Goal	Action(s)	Team:	December 2024	2025	Not started
------	-----------	-------	------------------	------	----------------



<b>6.1</b> Create a Community Engagement Framework that considers trusted practices for consulting with equity-denied individuals and communities across the age spectrum.	Community engagement policy <ul style="list-style-type: none"> <li>Also looking to track City engagement opportunities to avoid over-engaging communities</li> </ul>	Corporate Communications		x	x
<b>6.2</b> Adopt community-based research approaches when engaging with the Waterloo community towards a more collaborative engagement process.	Community partnerships <ul style="list-style-type: none"> <li>Various post-secondary collaborations</li> </ul>	All Divisions		x	x
	ClimateActionWR collaborative, working with TransformWR <ul style="list-style-type: none"> <li>Collaborative consists of members from across the region that provide guidance on the region wide community climate mitigation work</li> <li>Endeavors to include equity considerations as a key component in all climate work</li> </ul>	Strategic Initiatives	x	x	x
<b>6.3</b> Appropriately compensate community representatives for their time, efforts, and knowledge.	Honoraria and Compensation Policy	Community Programming and Outreach Services  Financial Management & Asset Management  Legislative Services, Information Security and Privacy  Planning  Reconciliation, Equity, Accessibility, Diversity, and Inclusion		x (Piloting policy)	x

	Committee review of Advisory Committees to Council <ul style="list-style-type: none"> <li>Will review the pilot project which provided remuneration intended to support transportation or other needs</li> </ul>	Legislative Services, Information Security and Privacy			X
<b>6.4</b> Support organizations and community groups with collecting their own data on the populations they serve.	Pilot with NORC (Naturally Occurring Retirement communities) <ul style="list-style-type: none"> <li>2 residential high-rise buildings in Waterloo</li> <li>Enable the NORC Committee to gather and evaluate data on their building to provide and coordinate effective programs and services</li> </ul>	Community Programming and Outreach Services		X	X
<b>6.5</b> Build City of Waterloo's capacity to effectively implement the Get READI Plan.	Staff Diversity and Inclusion Taskforce formed <ul style="list-style-type: none"> <li>To address diversity and inclusion in our workforce</li> <li>Recognized demographic data as a starting point, which led to the first staff Census and Survey</li> <li>Led to the development of the Diversity, Equity and Inclusion (DEI) Steering Group, DEI Resource Group and five working groups:             <ul style="list-style-type: none"> <li>Awareness Working Group</li> <li>Communications and Engagement Working Group</li> <li>Measurement and Monitoring Working Group</li> <li>Inclusive Workplace Working Group</li> <li>Respectful Workplace Working Group</li> </ul> </li> </ul>	All Divisions	X (2017) (2024: DEI Steering Group and Working Groups wrapped up)		X (2026: new Working Groups to be established based on support needs)
	Council Report: Indigenous Initiatives, Anti-Racism, Accessibility and Equity – Advancing a Staff Team (2020) <ul style="list-style-type: none"> <li>City to advance work through creation of a Reconciliation, Equity,</li> </ul>	Community Programming and Outreach Services	X (2016: part-time position of Community Outreach		

	<p>Accessibility, Diversity, and Inclusion (READI) Team</p> <ul style="list-style-type: none"> <li>Team includes leadership and 3 Advocates: <ul style="list-style-type: none"> <li>Accessibility Advocate</li> <li>Anti-Racism and Social Justice Advocate</li> <li>Indigenous Advocate</li> </ul> </li> </ul>		Coordinator was created)		
	<p>Membership in Inclusion Municipal Reference groups</p> <ul style="list-style-type: none"> <li>Network across Waterloo Region that meets regularly on best practices around Inclusion Services</li> </ul>	Community Programming and Outreach Services	x	x	x
<p><b>6.6</b></p> <p>Build an Implementation Plan to monitor progress of the goals listed in the Get READI Plan.</p>	<p>Get READI Implementation Plan</p> <ul style="list-style-type: none"> <li>First iteration serves as a benchmark</li> <li>Updated and published annually to track progress against Get READI Plan</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion		x	x
<p><b>6.7</b></p> <p>Develop a Measurement and Monitoring Framework to track progress on the outcomes of the Get READI Plan.</p>	<p>Measurement and Monitoring Framework to be developed</p> <ul style="list-style-type: none"> <li>Exploring available data</li> <li>Developing identity-based profiles</li> </ul>	Reconciliation, Equity, Accessibility, Diversity, and Inclusion			x

# NOTICE OF AN INFORMAL PUBLIC MEETING AND COMPLETE APPLICATION **ZONING BY-LAW AMENDMENT Z-25-25 ANNDALE HOLDINGS INC. 445 ANNDALE ROAD WARD 4 (NORTHEAST)**

**Monday, December 1, 2025**

**At a time to be determined**

**Council Chambers, City Hall, Waterloo City Centre, 100 Regina St S**

Anndale Holdings Inc. is proposing to build five blocks of townhouses with 15 linear townhouse units and 42 stacked townhouse units. The plan also includes 57 parking spaces and an additional 35 parking spaces to be shared between the existing spiritual use and visitor parking spaces. The existing church will be retained. The following zoning amendments have been requested to support the application:

- Rezoning the lands from Residential One (R1) to Residential Eight (R8);
- Increasing the maximum permitted building height to 12 m (currently limited to 10 m);
- Permit 35 parking spaces to be shared between the church and visitor parking spaces; and
- To permit 'spiritual use' as a permitted use in the R8 zone.



## HOW TO GET INVOLVED

The purpose of the public meeting is to share information and to hear and consider public and stakeholder comments regarding the planning application as part of City Council's decision making process. The public is invited to participate by submitting written comments in advance of the public meeting and/or arranging to speak to the application in person. All information related to the development application is posted on the Engage page at [www.engagewr.ca/445-anndale-rd](http://www.engagewr.ca/445-anndale-rd).

## NOTE

- i. If a person or public body would otherwise have an ability to appeal the decision to the Ontario Land Tribunal but the person or public body does not make oral submissions at a public meeting or make written submissions to the City of Waterloo before the by-law is passed, the person or public body is not entitled to appeal the decision.
- ii. If a person or public body does not make oral submissions at a public meeting, or make written submissions to the City of Waterloo before the by-law is passed, the person or public body may not be added as a party to the hearing of an appeal before the Ontario Land Tribunal unless, in the opinion of the Tribunal, there are reasonable grounds to do so.

## TO SUBMIT WRITTEN COMMENTS

Written comments received **before 9 a.m. on Wednesday, November 19, 2025** will be included in the City Council Agenda. Written comments received after 9 a.m. on Wednesday, November 19, 2025 will be provided to City Council for consideration prior to the Informal Public Meeting, but will not be included in the Council Agenda. Written comments can be provided in the following ways:

- Via the Engage Page link: [www.engagewr.ca/445-anndale-rd](http://www.engagewr.ca/445-anndale-rd)
- Via email to Madison Headrick ([madison.headrick@waterloo.ca](mailto:madison.headrick@waterloo.ca))
- By dropping off a hardcopy at Waterloo City Hall, addressed to **Madison Headrick, Planning Division, 2nd floor, 100 Regina St S, Waterloo, ON**
- By placing a hardcopy in the Waterloo City Hall after hours mail slot to the left of the side door entrance on William Street

All written submissions should clearly state **"Informal Public Meeting, Zoning By-law Amendment Z-25-25"** at the top of the letter/correspondence.

## TO SPEAK TO THE APPLICATION

If you wish to speak to the application, **please contact the Legislative Services Division no later than 10 a.m. on Monday, December 1, 2025, by any of the following ways:**

- By phone at **519-747-8549**
- By email to [clerkinfo@waterloo.ca](mailto:clerkinfo@waterloo.ca)

When we receive your registration, we will provide you with a confirmation message and instructions for participating in the public meeting.

We encourage the public to provide input into this important Zoning By-law Amendment application. The public is informed and notified that names, addresses and comments may be made public.

Julie Finley-Swaren, City Clerk, City of Waterloo.

For further information regarding the above matter, please contact the **City of Waterloo Integrated Planning and Public Works, 2nd Floor, Waterloo City Centre, Waterloo, Ontario**, by calling **Madison Headrick** at **519-886-1550** or email [madison.headrick@waterloo.ca](mailto:madison.headrick@waterloo.ca)  
**Council Meeting December 1, 2025**

**STAFF REPORT****Economic Development**

Title: Uptown Community Improvement Plan – CIP Update  
Report Number: CAO2025-026  
Author: Dominique Charbonneau  
Meeting Type: Council Meeting  
Council Date: December 1, 2025  
Attachments: Attachment 1: Draft – Uptown Community Improvement Plan Manual  
Attachment 2: Uptown CIP Designation By-law 2025-  
Attachment 3: Uptown CIP Adoption By-law 2025-  
Attachment 4: Letter of Support – Uptown Waterloo BIA  
Attachment 5: Letter of Support – Grand River Accessibility Advisory (GRAAC) Committee  
Attachment 6: Letter of Support – Sustainability Advisory Committee (SAC)

Ward No.: 7

**Recommendations:**

1. That Council approve report CAO2025-026.
2. That Council approve the Uptown Community Improvement Plan Manual included as attachment 1 to report CAO2025-026
3. That Council approve and pass the attached Uptown CIP Designation By-law and Uptown CIP Adoption By-law.

**A. Executive Summary**

This report provides an update to the Uptown Community Improvement Plan (CIP) following a comprehensive review of the program. The CIP is a tool that allows a municipality to direct funds and implement policy initiatives toward a specifically defined project area. Staff proposed a review of the program following a couple of years of reduced uptake. Since its inception in 2016, the program has had years of higher uptake (2017, 2018, 2021, 2022) mixed in with years with lower program uptake. Council directed staff via report CAO2024-024 to undertake a review of the Uptown Community Improvement Plan program and report back before December 31, 2025.

The updated CIP was developed through consultation with staff across divisions (including Finance, READI, Sustainability, Legal and Planning staff), key partners, community members and Council committees—including Uptown Waterloo BIA, Grand River Accessibility Advisory Committee (GRAAC), City of Waterloo Sustainability Committee (SAC), Waterloo Economic Development Advisory Committee (WEDAC), past CIP participants, Ministry staff, and the broader community. A participant questionnaire was distributed to past program participants and a public EngageWR survey was available online for 4 weeks through the City of Waterloo Engage page and promoted through social media.

The revised CIP reflects a number of changes based on the feedback received from this consultation. Several programs are recommended to continue (such as the Façade Improvement including the heritage component), however, some of the notable changes are proposed based on the feedback received:

- Re-activation of an updated version of the **Fee and Study Grant** to support applicants with the costs of planning studies and/or applications.
- Introduction of the **Accessibility Enhancement Grant**. This program is intended to support accessibility improvements in both interior and exterior of buildings and will support up to \$15,000 per project on a 75% matching grant basis.
- Introduction of the **Sustainability and Climate Resilience Grant** to encourage building improvements that improve energy efficiency and/or initiatives aimed at reducing carbon emissions. This program will provide a maximum grant amount of \$10,000 per project.
- Introduction of the Commercial Interior and Vacancy Improvement Grant to support new businesses to make interior investments needed to start up their business. This program will provide a maximum grant amount of \$10,000 per project.
- CIP program stacking capabilities for large projects capped at \$25,000 per project.
- Removal of the Parking Exemption Program from the CIP as a result of changes to legislation from the Province, that removed parking restrictions in Major Transit Station Areas.
- Application streamlining and language improvements for applicants.

The CIP program represents an important tool to support local businesses, to improve accessibility and sustainability of the building stock in the Uptown. If approved, notice of Council's decision will be forwarded to the appropriate agencies, groups and individuals, and if no appeals are received, the Plan will come into force.

## B. Financial Implications

The Uptown Waterloo CIP was established with funding from the Uptown Development Reserve Fund. On November 18, 2024, Council approved a one-year extension of the Façade Improvement Grant, Parking Exemption Program, and Major Activity Grant (TIG), under the Uptown Waterloo CIP until the end of 2025.

The remaining balance in the Uptown CIP project, after accounting for committed grants not yet issued, is \$536,000 and \$222,000 is budgeted for 2026 to cover an additional year of the program via capital reference #118 (funded by the Economic Development Reserve). There is currently adequate funding within the project that will help support the project over the next couple of years.

Staff will monitor the program uptake and will report to Council on an annual basis. Any future funding increases due to increased demand will be requested via future capital budget processes.

## C. Technology Implications

Adjustments to the Community Improvement Plan (CIP) program application form and web-based content will be coordinated with the City's Communications Department as a result of the adoption of the new CIP.

## D. Link to Strategic Plan

(Strategic Priorities: Reconciliation, Equity, Accessibility, Diversity and Inclusion; Environmental Sustainability and Climate Action; Complete Community; Infrastructure and Transportation Systems; Innovation and Future-Ready)

(Guiding Principles: Equity and Inclusion; Sustainability; Integrity; Workplace Wellbeing; Community-centred; Operational Excellence)

The Uptown Waterloo Community Improvement Plan contributes to:

- **Equity and Inclusion** – invest in accessibility and inclusion to enhance belonging: The CIP funds barrier-free projects through the Accessibility Enhancement and related façade/interior improvement programs, lowering cost barriers so more residents can access everyday services and participate fully in community life. This directly advances commitment to equity, accessibility and inclusion.
- **Sustainability and Climate Action** – Climate leadership: The Sustainability and Climate Resilience program drives decarbonization and resilience – translating to City's climate leadership priority into funded private-realm action.
- **Complete Community** – achieve a high quality of life for all residents (vibrant public spaces): The vacancy/interior and façade/heritage program features reactivate storefronts, improve safety and streetscape quality, and expand local amenities, while housing-oriented incentives (where included) support the

development of our local housing supply – together creating lively, walkable districts.

- **Innovation and Future-Ready City** – Support a diversified economy and innovation ecosystem: The Major Activity Grant (TIEG) catalyzes new and renovated workspace and housing options for our growing community, while grants for modernization of commercial spaces reduce costs to SMEs, therefore strengthening Waterloo’s innovation ecosystem and economic diversity.

#### E. Previous Reports on this Topic

- CAO2024-024\_ Uptown Community Improvement Plan (CIP) – 2024 Annual Update and Extension
- CAO2023-028 Uptown Community Improvement Plan (CIP) – 2023 Annual Update and Extension
- CAO2022-013 Uptown CIP Update
- CAO2021-020 COVID-Relief City Wide CIP and Uptown CIP Update
- CAO2020-019 COVID-Relief Community Improvement Plan (CIP)
- CAO2019-005 Uptown Community Improvement Plan (CIP) – 2018 Annual Update Report and CBIL Approval
- CAO2018-021 – Uptown Community Improvement Plan (CIP) – Commercial Building Improvement Loans – Spring 2018 (June 25, 2018)
- CAO2018-005 – Uptown Community Improvement Plan (CIP) – Continuation of the Façade Improvement Grant Bump-Up (April 16, 2018)
- CAO2018-002 – Uptown Community Improvement Plan – Commercial Building Improvement Loans (January 22, 2018)
- CAO2017-030 – Uptown Community Improvement Plan (CIP) – 2017 Annual Update Report (December 11, 2017)
- CAO2017-009 – Uptown Parking Exemption Program with Section 40 Planning Act Parking Agreement for 6 Regina Street North and 24, 28 and 34 Erb Street East (April 24, 2017)
- CAO2016-012 Uptown Community Improvement Plan (CIP) – 2016 Annual Update Report (December 12, 2016)
- CAO2016-006 – Uptown Parking Exemption with Section 40 Parking Agreement for 9 King Street North (June 27, 2016)
- CAO2016-001 – Uptown CIP Program Activation (February 22, 2016)





## **Uptown Community Improvement Plan – CIP Update CAO2025-026**

### **1.0 INTRODUCTION**

The CIP is an important tool for helping to achieve the City's vision and objectives for lands within the Uptown Community Improvement project area. Grounded in the City's Official Plan and Corporate Strategic Plan, the CIP aims to achieve measurable outcomes in sustainability, equity, economic development, and urban design through a suite of targeted municipal incentives and initiatives. The overarching goals of the CIP are to:

- Facilitate the redevelopment of underutilized buildings, to promote intensification and improvement in the Uptown.
- Encourage repair and adaptive reuse of exiting building stock.
- Create and retain employment opportunities and attract new businesses to occupy vacant buildings.
- Attract new businesses to locate in Uptown and support existing businesses.
- Improve accessibility of Uptown businesses and buildings.
- Reduce greenhouse gas emissions and support climate adaptation measures and align with municipal climate targets and future green building standards.
- Help small businesses modernize interiors.
- Conserve built heritage resources.
- Create new office employment opportunities.
- Incentivize affordable housing.
- Improve building safety and security.
- Enhance public realm and streetscapes.
- Increase the value of land and buildings within the Community Improvement Project Area.

### **1.1 Purpose of a Community Improvement Plan**

Section 28 of the Ontario *Planning Act* allows municipalities to designate an area as a community improvement project area and prepare a community improvement plan (CIP) for that area if in the opinion of the Council, the improvement of that area “is desirable because of age, dilapidation, overcrowding, faulty arrangement, unsuitability of buildings or for any other environmental, social or community economic development reason.” A CIP provides the framework for, and works in conjunction with, other municipal policy documents such as the official plan, zoning by-law, and urban design guidelines to guide reurbanization of a community improvement project

area, including building rehabilitation, adaptive reuse, infill, intensification, and redevelopment, and to acquire or dispose of lands to meet key municipal objectives.

Once a CIP containing appropriate enabling policies has been adopted by a municipality and comes into effect, it allows that municipality to:

- i) Acquire, hold, clear, grade or otherwise prepare land for community improvement;
- ii) Construct, repair, rehabilitate or improve buildings on land acquired or held by it in conformity with the CIP;
- iii) Sell, lease, or otherwise dispose of any land and buildings acquired or held by it in conformity with the CIP;
- iv) Make infrastructure and public space improvements; and
- v) Make grants or loans, in conformity with the CIP, to registered owners, assessed owners and tenants of land and buildings within the community improvement project area, and to any person to whom such an owner or tenant has assigned the right to receive a grant or loan, to pay for the whole or any part of the eligible costs of the CIP.

## **1.2 Uptown Community Improvement Project Area**

The CIP Project Area is shown as Figure 1 and includes the Uptown Waterloo Urban Growth Centre and the MacGregor/Albert Heritage Conservation District. The CIP project area boundary remains unchanged from the previous program. Staff did undertake a review of the boundary and based on input received, staff capacity, and existing budget, it was felt this boundary was still appropriate.

## **1.3 Process and Consultation**

A review of the existing Uptown Waterloo Community Improvement Plan (CIP) was initiated in early 2025. The review responds to Council direction to “undertake a review of the Uptown Community Improvement Plan program, including the BIA, and report back before December 31, 2025.”

The updated CIP was developed through consultation with members of the community, past program participants, the Uptown Waterloo BIA, Grand River Accessibility Advisory Committee (GRAAC), City of Waterloo Sustainability Committee (SAC), Waterloo Economic Development Advisory Committee (WEDAC), in addition to City staff across divisions (including Finance, READI, Sustainability, Legal and Planning staff). A participant questionnaire was distributed to past program participants with subsequent follow-up. In addition, a public EngageWR survey was actively promoted through the BIA and City communications channels and was available online via the Engage Waterloo platform for 4 weeks. The revised CIP reflects a number of changes based on the feedback received.

Notice of the Statutory Formal Public Meeting for the proposed Uptown Waterloo CIP was published in the *KW Record* on November 24<sup>th</sup>, 2025, with additional circulation to prescribed agencies and interested parties in accordance with the Planning Act. This meeting provides an opportunity to comment on the proposed changes within the updated plan.

If Council wishes to approve the proposed CIP, they must also approve the proposed by-law included on the December 1, 2025 agenda. Once adopted, notice of the decision will be issued. Provided no appeals are received within twenty days following the notice, the CIP will come into force and effect.

## **2.0 OVERVIEW OF COMMUNITY IMPROVEMENT PLAN**

Overall, the feedback received from previous program participants about the Uptown Waterloo CIP was positive. 88% of respondents rated their overall experience with the program as good or excellent. In addition, 73% rated the documentation process as “easy” while 60% rated the application process as “simple” and 20% rated it as neutral. Overall, the program was seen as a useful tool for supporting improvements in the community.

Past program participants consistently noted that the program would benefit from a more streamlined process, noting that the process of obtaining 3 quotes was burdensome. In addition, they noted that clearer service-standard timelines, broader categories of eligible expenses, improved program awareness, and clearer “how-to” guidance would improve the program administration.

Input from the broader public reflected similar priorities to those from previous program participants. Both groups prioritized grants as the most important form of financial assistance. Moreover, input was aligned around funding projects that support affordable housing, accessibility upgrades, sustainability/energy efficiency (e.g. heat pumps), provide permit-fee reliefs, support measures to create safer and more active vibrant storefronts (including CPTED features), and additional interest in providing potential patio supports.

Input regarding how the City communicates the program included preferences for promoting the program on City social media channels, the City website, and through direct email such as BIA and City e-newsletters. It was also noted that proactive communication from staff to applicants is a valued part of the process and should be continued.

### **2.1 Proposed Incentive Programs**

Based on the input received, a number of program components are proposed to be continued, some to be reinstated, and additional new programs are being proposed. It should be noted that the overall program suite has also been updated to allow for submissions under more than one category to a total contribution of \$25,000 per

project. This would allow a project that may include a number of components, such as exterior and accessibility upgrades to receive funding under those program areas, as well as to receive support for required studies and/or planning fees.

The Uptown Waterloo BIA emphasized in their feedback that many of the existing programs favour building owners and noted that start-up costs can be significant for new businesses. As a result, a new Commercial Vacancy and Interior program has been proposed. As businesses are frequently responsible for interior leasehold improvements, it is hoped that this program, combined with the Fee and Study program being reinstated will directly support new businesses.

Four components of the original CIP are proposed to be continued and/or re-instated. These include the Façade Improvement and the Major Activity Grant programs as well as the City's Municipal Land Development Opportunities Program (previously named "Municipal Leadership Strategy"). As well, based on the input received, it is recommended that the Fee and Study Grant components be reinstated. In addition, the proposed updates to the Uptown Waterloo CIP introduces new incentive programs designed to stimulate private-sector investment and development activity that advances community improvement goals. The existing programs that are proposed to be extended include minor updates to eligible projects and program criteria as follows:

**1. Commercial and Heritage Property Façade Improvement Grant Program**

Encourages businesses and commercial property tenants to enhance the appearance of buildings and streetscapes within the Uptown Project Area. Grants cover 50% of eligible exterior building and property improvement costs, up to \$10,000 per street-facing façade, or \$15,000 for corner-lot properties with improvements on both façades. Eligibility is contingent on conformity with applicable design guidelines and heritage conservation criteria (when applicable). Where a building is designated as a heritage property, an additional \$5,000 may be available.

**2. Major Activity Grant Program (Tax Increment Grant)**

This program targets large-scale redevelopment projects that deliver significant employment or affordable housing outcomes. Grants are provided annually to offset an increase in assessment value and is provided as a percentage of the increase in municipal property taxes for up to ten (10) years, following completion of an eligible project and reassessment by MPAC. This program has had no uptake over the years. Staff suspect it may be a result of complexity of program criteria, however a more fulsome review of this program in conjunction with finance team and in relation to other housing initiatives is required to ensure alignment. Any future program revisions to refine the program criteria will be brought back to Council for future approval.

**3. Fee and Study Grant Program**

This program supports reurbanization projects by offsetting costs associated with planning, design, and professional studies. Grants may cover up to 50% of eligible City fees (planning/development applications, building permits, heritage permit fees, etc.) and/or professional studies (urban design studies, architectural/design drawings, energy

or accessibility audits), up to a maximum of \$5,000 per project. A project may only be eligible if the fees and/or studies are required for an Uptown commercial or heritage restoration/construction project.

#### **4. Municipal Land Development Opportunities: Property Acquisition, Disposition, Investment and Improvement Program**

This program enables the municipality under Section 28 of the Planning Act to sell, lease or otherwise dispose of land acquired or held by it in the community improvement project area, to any person or governmental authority for use in conformity with the CIP. This program is carried forward from the previous Uptown Community Improvement Plan, with minor updates to the strategic projects that may benefit the municipality.

#### **The new suite of programs that are proposed include:**

##### **5. Accessibility Enhancement Program**

This program promotes accessibility improvements to commercial buildings for improvements to both interior and exterior parts of the building. Grants will cover 75% of eligible costs, up to a maximum of \$15,000 per project. In exceptional cases, and at the City's discretion, funding may cover up to 100% of eligible costs. Projects must align with heritage conservation requirements (when applicable).

##### **6. Sustainability and Climate Resilience Program**

This program encourages sustainable design, energy efficiency, and climate resilience measures in building retrofits. Grants cover 50% of eligible costs, up to \$10,000 per project. Eligible projects may include retrofits that reduce greenhouse gas emissions, increase resilience to climate impacts, or reduce resource consumption. Projects must align with design guidelines and heritage conservation requirements, where applicable. All projects must obtain the necessary city permits and meet external agency requirements (when applicable).

##### **7. Commercial Interior and Vacancy Improvement Program**

The purpose of this program is to support the costs of interior construction and renovations to facilitate occupancy of vacant commercial units, and to support new businesses to succeed by reducing the impact of start-up leasehold improvements. Grants cover 50% of eligible costs, up to \$10,000 per project. All projects must obtain the necessary city permits (when applicable).

## **2.2 Monitoring and Implementation**

If approved, there is currently adequate funding within the project that will help support the project over the next couple of years, with future funding being considered as part of the capital budget process and subject to funding capacity and Council approval. The program will be supported by the development of implementation materials outlining more detailed procedures, criteria and requirements. Programs will be monitored to facilitate regular reporting to Council and the community regarding the success of the programs and to enable refinement, as necessary.

### **3.0 COLLABORATION OPPORTUNITIES**

Based on the input received and staff review, opportunities to improve awareness of the program have been identified. Primarily, overall program awareness among businesses within the CIP can be increased through continued collaborative efforts with the Uptown Waterloo BIA, by promoting through their newsletter, social and directly through their business outreach program. The BIA has supported the program in the past and continued partnership will ensure that new businesses hear about the program. In addition, direct outreach to key property owners in the Uptown will ensure that new tenants can be informed of the program before they initiate any eligible improvements.

Additional avenues for improving awareness of the CIP will be to work closely with other city departments (such as planning) to ensure they have resources available to distribute at their customer reception desk, as well as including an information statement in pre-consultation application responses. Information will also be shared at team meetings.

Staff will also continue to enhance marketing of the CIP program through historic avenues such as social media, the economic development Smart Business Newsletter, City screens, as well as exploring opportunities for advanced collaboration with other relevant groups (e.g. developers, realtors).

### **4.0 CONCLUSION**

The CIP provides a toolkit that can be used to help achieve key objectives within the Uptown Project Area such as improving accessibility, reducing carbon emissions, and supporting new businesses to occupy vacant spaces. The financial incentive programs have been specifically designed to support revitalization within the Uptown Project Area by stimulating private sector investment in targeted areas. A framework is also provided to enable the City to leverage City-owned lands and municipal resources to support achieving community improvement objectives in the Uptown Project Area.

Ongoing monitoring of the performance of the programs will be undertaken with annual reporting to Council as well as Council approval through future budget processes. The success of each program component will be evaluated, as well as current funding levels. Staff propose that, similar to the previous program, that any future minor adjustments (e.g. correcting typographical errors, revisions to definitions, and administrative details of specific programs such as application intake periods) of the programs will be undertaken as required to administer the program and will not require Council approval. Any significant changes (e.g. modifications to the Community Improvement Project Area, addition of a new incentive program, changes to the types of eligible projects or an additional of a new eligible project, and changes to eligibility criteria) or pausing of any programs will be brought to Council for consideration.



ATTACHMENT 1:  
Uptown Community Improvement Plan Program Manual

UPTOWN

# Community Improvement Plan

2026



# Table of Contents

## UptownCommunity Improvement Plan

Introduction.

What is a Community Improvement Plan(CIP)?

LegislativeContext

City of WaterlooPolicy Context

How to Use this Manual

UptownCIP Project Area

## UPTOWN INCENTIVE PROGRAMS.

Purpose

- Commercial and Heritage Façade Improvement Grant Program.
- Fee and Study Grant Program
- Accessibility Enhancement Program
- Sustainability and Climate Resilience Program
- Major Activity Grant Program

General Requirements:Applying toall Programs...

## IMPLEMENTATION

How to Use This Manual

Before You Apply

FundingAvailable

ApplicationProcess

Review Process

Payment

Monitoring andReporting

How We Track Success

Program Changes

## CIP PROGRAMDETAILS.

Commercialand Heritage FaçadeImprovement Grant Program

Purpose:

Funding:

Program-SpecificRequirements:

Eligible Expenses:



**Fee and Study Grant Program****Purpose:****Funding:****Program-Specific Requirements:****Eligible Fees:****Eligible studies:****Accessibility Enhancement Program.****Purpose:****Funding:****Program-Specific Requirements:****Eligible Expenses:****Sustainability and Climate Resilience Program****Purpose:****Funding:****Before You Start****Program-Specific Requirements:****Eligible Expenses:****Commercial Interior and Vacancy Improvement Program****Purpose:****Funding:****Program-Specific Requirements:****Eligible Expenses:****Ineligible Expenses:****Major Activity Grant Program****Purpose:****Description:****Municipal Land Development Opportunities: Property Acquisition, Disposal, Investment and Improvement Program****Criteria****Appendix A****Major Activity Grant Program (Tax Increment Equivalent Grant)**

# Uptown Community Improvement Plan

## Introduction

Uptown Waterloo is the heart of the city - a vibrant economic, cultural, and residential hub where people live, work, study, and gather. Central within the Uptown Urban Growth Area in proximity to multiple Major Transit Station Areas (MTSAs) and well served by transit, makes the Uptown a priority area for economic growth and investment in Waterloo. Uptown Waterloo is a local and regional centre for services, recreation, finance and technology, retail, entertainment, arts, educational and institutional uses, and is a vibrant place where people live.

This Community Improvement Plan (CIP) aims to strengthen the Uptown core through targeted incentives. The CIP encourages commercial and office building improvements, office development, and heritage preservation while advancing environmental sustainability, climate resilience, and community accessibility.

## What is a Community Improvement Plan (CIP)?

Community Improvement Plans (CIPs) help municipalities attract investment and support urban development and redevelopment in defined project areas. Where the Official Plan includes enabling policies, Section 28 of the Planning Act authorizes municipalities to use a CIP as the legal basis for offering financial incentives. The purpose of a CIP is to provide for the implementation of community improvement initiatives within a defined project area.

A municipality may make grants or loans to registered owners, assessed owners and to tenants of lands and buildings within a community improvement project area, as well as to anyone assigned the right by such an owner or tenant, to pay all or part of eligible project costs that are intended to achieve the stated CIP objectives. Eligible costs may include expenses related to development and redevelopment, construction and reconstruction, site preparation, building rehabilitation or improvements, enhancing energy efficiency, reducing greenhouse gas emissions, improving accessibility, encouraging affordable housing, as well as other improvement and safety-enhancing projects.

## Legislative Context

The Ontario Planning Act (Section 28) allows municipalities to adopt a Community Improvement Plan (CIP) as a tool to direct funds and implement policies intended to encourage revitalization initiatives and/or stimulate economic development or redevelopment. Through community improvement plans, municipalities can focus public attention on local priorities and municipal initiatives, target areas in transition or in need of repair, rehabilitation and redevelopment, facilitate and encourage community change in a coordinated manner and stimulate private sector investment through municipal incentive-

based programs. Part IV of the Planning Act states that Council may identify a CIP project area through By-law, provided their Official Plan contains provisions relating to Community Improvement.

The *Ontario Heritage Act* (Section 39 and 45) allows municipalities to pass by-laws that provide for loans or grants to owners of properties designated under the *Ontario Heritage Act*. The purpose of the grants and loans are to pay for all or part of the costs of alterations to such designated buildings, consistent with terms and conditions that may be set out by the municipality. The bonusing rule included in the *Municipal Act* does not apply to grants or loans made under this Section of the *Ontario Heritage Act*.

## City of Waterloo Policy Context

The City of Waterloo Official Plan contains comprehensive policies designed to direct the form, nature and rate of growth and change within the municipality. The City of Waterloo Official Plan provides the necessary framework to establish a Community Improvement Project Area in the city, and outlines the goals and objectives for a Community Improvement Plan, to achieve one or more of the following Official Plan objectives:

- Preserve and enhance the Uptown Waterloo Urban Growth Centre as a major focal point and destination for investment in institutional and region-wide public services, regional-serving land uses and activities such as recreational, social, cultural, entertainment, office, tourism, and significant employment uses;
- Improve environmental, social, cultural, economic development, or safety conditions;
- Promote and focus public and private sector investment into maintenance, rehabilitation, and redevelopment activities that improve the living and working conditions in the City; and
- Encouraging private sector renovation, repair, rehabilitation, redevelopment or other improvement of lands and/or building, including environmental remediation, development, redevelopment, construction and reconstruction of lands and buildings for rehabilitation purposes, or for the provision of energy efficient uses, buildings, structures, works, improvements or facilities.

In addition, the City of Waterloo Strategic Plan promotes programs that are intended to support the overall economic vitality of the city, including:

- Supporting a Diversified Economy and innovation ecosystem
- Investing in accessibility and inclusion to enhance belonging
- Becoming leaders in sustainability practices and climate action – working together with organizational and community champions to align activities and achieve climate action mitigation and adaptation to create a more resilient community.
- Developing Complete Communities to achieve a high quality of life for all residents and overall community vibrancy through strategic density, diverse housing options and equitably available parks, public spaces and other recreational and cultural amenities
- Implementing the Affordable Housing Strategy

## How to Use this Manual

This manual outlines the Uptown CIP program framework and the financial assistance programs available to property owners and tenant businesses in Uptown Waterloo. Each

program has specific requirements and funding limits. Before applying, please review the General Program Requirements in addition to the program-specific requirements. Always consult with the City to determine if any permits and/or planning approvals may be required such as a building permit, heritage permit, and/or a sign permit.

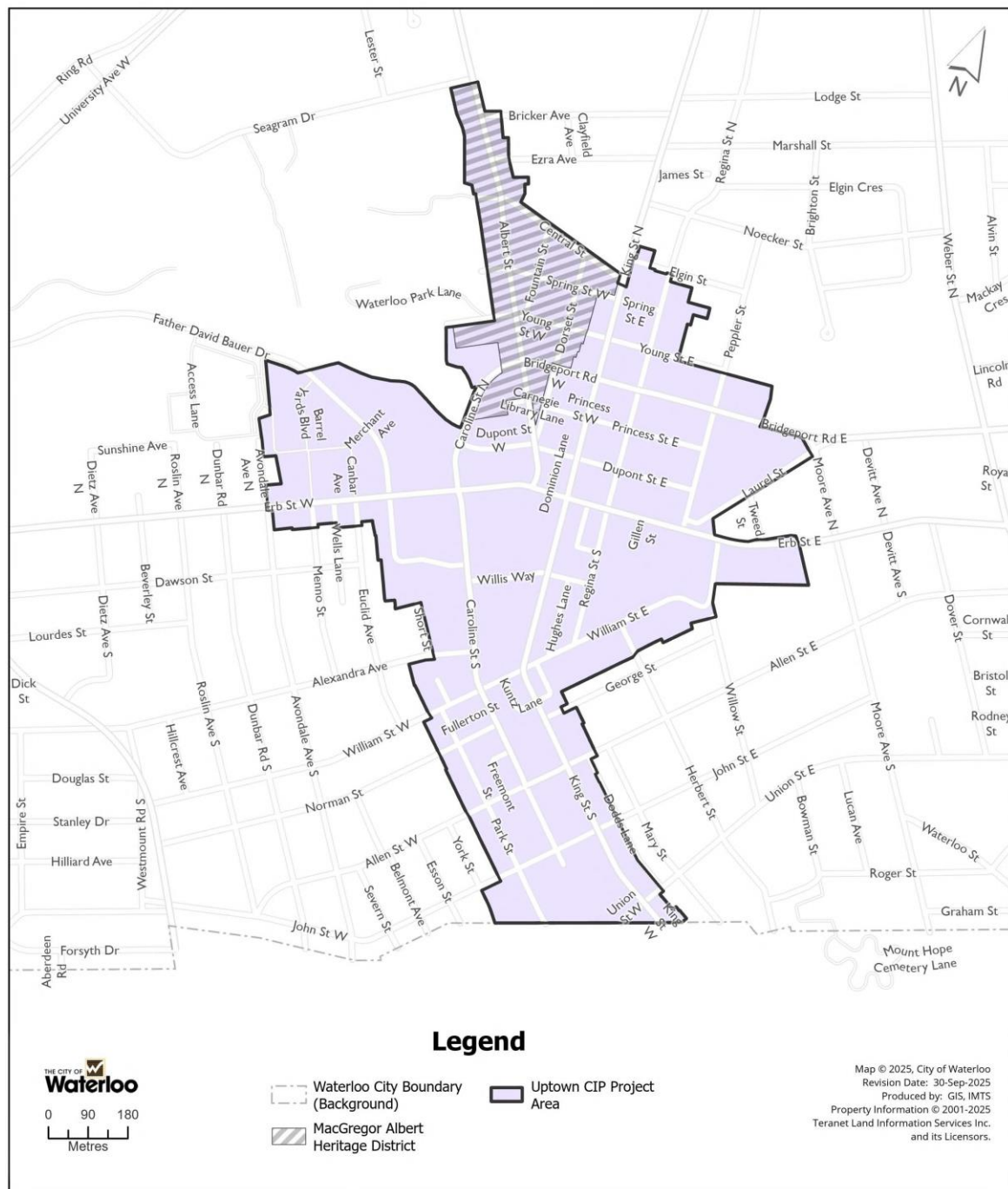
Important Note: All programs are subject to available funding as approved by City Council. Applications are reviewed on a first-come, first-served basis. Tax Increment Equivalency Grant Programs are subject to Council approval.

## Uptown CIP Project Area

The Uptown Community Improvement Project Area (also referred to as the “Project Area”), is shown in Figure 1, and encompasses the Uptown Waterloo Urban Growth Centre, and the MacGregor/Albert Heritage Conservation District. The Uptown Waterloo Urban Growth Centre (Uptown) comprises a substantial portion of the CIP Project Area and continues to serve as a major focal point and destination for investment within the City, with a target of 200 residents and jobs per hectare. The Uptown Growth Centre serves as a focal point transit-oriented development, pedestrian oriented streetscapes and higher density to encourage a diversity of commercial, cultural and employment opportunities, and concentrating growth to make efficient use of existing infrastructure. The City’s Official Plan identifies this area as a destination within the community as well as fulfilling a local service and administration function for surrounding neighbourhoods. Properties within the MacGregor/Albert Heritage Conservation District have been designated under Part V of the Ontario Heritage Act, and properties in the district require a heritage permit to make alterations that may change heritage features. This program is intended to provide supports to help owners of heritage properties in this district offset costs of preserving or restoring the exterior heritage features.

Figure 1: Uptown Community Improvement (CIP) Project Area

## Uptown Community Improvement Project Area



# UPTOWN INCENTIVE PROGRAMS

## Purpose

The purpose of this Community Improvement Plan (CIP) is to support the ongoing transformation of Uptown Waterloo into a vibrant, inclusive, and economically resilient Urban Growth Centre by enabling targeted financial incentives that attract private investment, encourage strategic redevelopment, and advance the City's goals for intensification, affordability, employment growth, and complete community building. This CIP enables the City to offer a suite of financial incentive programs to encourage private-sector investment aligned with these goals.

Specifically, the CIP aims to:

- Facilitate the redevelopment of underutilized buildings, to promote intensification and improvement in the Uptown
- Encourage repair and adaptive reuse of exiting building stock
- Create and retain employment opportunities and attract new businesses to occupy vacant buildings
- Attract new businesses to locate in Uptown and support existing businesses
- Improve accessibility of Uptown businesses and buildings
- Reduce greenhouse gas emissions and support climate adaptation measures and align with municipal climate targets and future green building standards
- Help small businesses modernize interiors
- Conserve built heritage resources
- Create new office employment opportunities
- Incentivize affordable housing
- Improve building safety and security
- Enhance public realm and streetscapes
- Increase the value of land and buildings within the Community Improvement Project Area

## Uptown Community Improvement Plan (CIP) Toolkit

The Uptown Community Improvement Plan (CIP) Program has been in place since 2016. The program had realized a number of minor amendments, and it was time for a comprehensive review to reflect new strategic priorities. As part the review, City policy goals were reviewed, along with best practices. The public and past program participants and partners such as the Uptown Waterloo BIA were consulted to understand priorities, missing program areas and opportunities to streamline the program.

The CIP is comprised of a suite of tools intended to foster economic activity in the core area to encourage redevelopment and adaptive reuse of existing buildings, modernization of existing buildings through improved sustainability and/or accessibility enhancements, enable businesses to modernize interiors to help them compete, encourage the occupancy of vacant commercial units, encourage affordable housing, as well as to support new commercial businesses. The CIP is intended to support private investment in the Uptown by using financial mechanisms such as grants and tax-increment grants (TIG) to reduce the cost of improvements, development and redevelopment for owners and tenants of

commercial, institutional and mixed-use buildings, as well as owners of designated heritage properties.

Incentive Programs in the 'toolkit' include

A suite of tools is outlined for building owners and businesses to help support strategic investments in the core area of Waterloo. The list of CIP programs within the toolkit can be found in Figure 2 and include:

- Commercial and Heritage Façade Improvement Grant Program
- Fee and Study Grant Program
- Accessibility Enhancement Program
- Sustainability and Climate Resilience Program
- Commercial Interior and Vacancy Improvement Grant
- Major Activity Grant Program
- Municipal Land Development Opportunities Program

An applicant may apply to more than one program and is eligible for a total cumulative grant of up to \$25,000. It should be noted however that the TIG programs can not be combined with any other program listed in this toolkit.

Figure 2: CIP Toolkit - Overview of Programs

PROGRAM	DESCRIPTION
Commercial and Heritage Façade Improvement Grant Program	<p>Purpose: To encourage commercial or mixed-use commercial property owners and tenants to rehabilitate and improve the appearance of the streetscape and buildings in the Uptown project area, as well as to support conservation of heritage properties and buildings.</p> <p>The Façade program will provide a grant equal to 50% of the cost of eligible exterior building maintenance and property improvement works to buildings, up to a maximum of \$10,000 per street-facing façade, and a maximum of \$15,000 where improvements occur on both facades on a corner lot. Improvement of façades may include signs, lighting and other security features. Outdoor decks and patios may be eligible for Façade Improvement Grants. An additional \$5,000 is available where a property is designated under the Ontario Heritage Act.</p>
Fee and Study Grant Program	

	<p>Purpose: To offset the costs for studies and fees required for permits and applications required under the Planning Act, Building Code, or to achieve heritage or sustainability goals and/or fire compliance that are required for approved projects under this program.</p> <p>The Fee and Study Grant program will provide grants equal to 50% of the fees paid on City planning/development applications such as Minor Variances, Site Plan, minor Zoning By-law amendments to expand the range of permitted employment uses, as well as building, demolition, heritage and/or sign permits.</p> <p>The program may also provide a grant for up to 50% of the cost of preparing professional studies required to obtain a license or permit or to apply for a planning application. These may include professional architectural/engineered drawings, fire assessments/studies or plans, energy audit, accessibility audit or other required study. Combined fees and studies cover up to a maximum of \$5,000 per project.</p>
Accessibility Enhancement Program	<p>Purpose: To encourage commercial or mixed-use commercial property owners and tenants to improve the interior and exterior accessibility of their building façades.</p> <p>Grant equal to 75% of the cost of eligible building improvements made by existing businesses and/or to retrofit a commercial building, up to a maximum of \$15,000 per project. In exceptional cases, applicants may request a grant of up to 100% of eligible expenses by making the request at the time of application and outlining the reasons supporting the request.</p>
Sustainability and Climate Resilience Program	<p>Purpose: Promote sustainable design, energy efficiency, reduced carbon</p>



	<p>emissions and climate resilience through existing commercial and mixed-use commercial building upgrades.</p> <p>The sustainability and climate resilience grant is up to 50% of the cost of eligible improvements or retrofits to existing commercial buildings - to a maximum of \$10,000 per project. The program supports projects that contribute to greenhouse gas (GHG) reduction, enhance climate resilience, and/or improve energy efficiency.</p>
Commercial Interior and Vacancy Improvement Program	<p>Purpose: To help cover the costs of interior construction and renovations to facilitate occupancy of vacant commercial units, to support new businesses to succeed by reducing the impact of start-up leasehold improvements.</p> <p>Provides a grant of up to 50% of the costs to improve vacant commercial space up to a maximum of \$10,000, including eligible material and labour costs. The grant will also support major renovations by long-standing businesses required to enhance the customer experience and to modernize their restaurant/store.</p>
Major Activity Grant Program (Tax Increment Equivalent Grant)	<p>Purpose: To promote major redevelopment projects that create a substantial amount of employment or affordable housing land uses as a priority, while supporting development that includes heritage conservation and/or sustainable buildings.</p> <p>Provides an annual grant equal to a percentage of the increase in municipal property taxes for up to 10 years after project completion. Amount of the grant is tied to as-built project performance, with an increased grant available to projects that meet sustainability and/or heritage conservation criteria.</p>

Note: Additional details on the evaluation of applications for the Major Activity Grant Program are provided in Appendices C and D. The appendices to this CIP do not form part of the formal CIP and may be revised or updated from time to time, as required, without formal amendment to this Plan.

## General Requirements Applying to all Programs

All financial incentive programs contained in this CIP are subject to the following general requirements as well as the individual requirements specified for each program. These program requirements are not intended to be exhaustive, and the City reserves the right to include other reasonable requirements and conditions as deemed necessary on a project-specific basis. Please reach out to CIP program staff with any questions.

- 1) Location: Projects must be fully located within the CIP Project Area
- 2) Retroactive Funding: Works started prior to submitting an application are ineligible. Depending on the project scope of work, city staff may grant permission to an applicant to commence certain types of project work after submitting an application but is subject to approval on a case-by-case basis. It should be noted that any works undertaken in advance of an application decision would be done at the applicant's risk and does not negate any requirements for permits
- 3) Who can apply: Registered property owners, may apply as well as tenant businesses or an assignee/agent with the written consent of the property owner
- 4) Business licensing: Applicants must hold a current City of Waterloo Business License where required or be exempt under the City's Business Licensing By-law
- 5) Taxes: Property taxes and other municipal obligations and licenses must be in good standing
- 6) Municipal Compliance: Proposed, approved and as-built works must conform to all relevant municipal by-laws, standards, policies and procedures including (but not limited to) the City of Waterloo Official Plan, Zoning By-law and/or site plan and engineering standards
- 7) Legislative Compliance: All approved works and improvements shall conform to relevant Federal and Provincial legislation including but not limited to, the Environmental Protection Act and the Ontario Building Code
- 8) Scope: All project works must match the approved scope and drawings unless amended with City approval
- 9) Application completeness: Applications must include all plans, drawings, photographs, studies, estimates, and any required permits (e.g. building, sign, heritage) as outlined in the program guidelines. Applicants may be asked to provide additional information to demonstrate a business' financial track record
- 10) Project Funding: The grant reimbursement shall not exceed \$25,000 across all programs. The total grant reimbursement percentage will be calculated based on the estimate stated in the approval letter, or the actual expenses submitted (which ever is lower)
- 11) Review & approval: City staff evaluate applications against program eligibility, project scope and built performance criteria to make a recommendation for project

approval. In the case of a conflict in the provisions, the most stringent requirements shall apply

- 12) Partial Funding: The City reserves the right to approve a portion of the grant requested based on availability of funds and the ability of a proposed project to meet program goals
- 13) Decision: CIP Review will endeavour to provide a decision to an applicant within four (4) weeks of complete application, or final issuance of required permits (whichever is later)
- 14) Timing: Proposed improvements are to be completed within one year to be eligible for payment. A one-year extension may be authorized by the Executive Director of Economic Development if an applicant has extenuating circumstances that would warrant an extension
- 15) Outstanding orders: Any outstanding work orders and/or requests to comply from the City must be satisfactorily addressed and resolved prior to issuing any approval, extension or payment of financial incentive
- 16) Agreements: Applicants of the TIEG programs will be required to enter into a grant agreement (which may be registered on title), setting out terms, duration, default and termination provisions of the program
- 17) Evidence & audits: Applicants must keep all required documentation of the approved project including estimates, photographs (before and after), contracts, approval letters, invoices, and paid receipts, Applicants must submit documentation as required to form a complete application and to validate the completion of the approved project. Applicants must provide photographs of completed works outlined in the project scope of work
- 18) Inspection: The City reserves the right to inspect the property that is the subject of a financial incentive program, prior to approval and releasing any grants
- 19) Multiple Program Limits: Applicants may combine CIP programs (where eligible). The maximum funding that will be provided to one property is \$25,000 which is the combined total of across all CIP incentives
  - Tax Increment Equivalent Grants may not be combined with other Uptown CIP programs
  - Eligible expenses may only be submitted to one program.
  - The City of Waterloo CIP may be combined with other Provincial or Federal Grant programs to a combined total contribution of no more than 100%, for any eligible project cost.
  - Total assistance from all sources (including other government and nonprofit funding) must be declared.
  - The City reserves the right to reduce the total amount of grant monies issued.
- 20) Payments & City liability: Grant reimbursement for demonstrated eligible expenses will be paid after project completion has been demonstrated and verified. The City is not responsible for any costs incurred before approval/agreement execution or in anticipation of a grant
- 21) Default, discontinuation & repayment: If an applicant is in default of general or program specific requirements, the City may delay, reduce or cancel its financial incentive approval. Should the owner or tenant of the approved eligible project default on any condition in the agreement or by-law, the grants plus interest will be payable to the City in full

- 22) Discontinuation of the Program: The City may discontinue any of the financial incentive programs at any time with Council approval. Notwithstanding this any approved outstanding project grants continue subject to all requirements
- 23) Affordable unit security: Where grants relate to affordable housing, the City may require security (e.g. registration on title) to ensure affordability for the defined period
- 24) Transfer & sale: Grants are awarded to the original agreement holder and are not transferable unless approved by the City. If a property is sold during the eligibility period the City may (upon request) and at its discretion, transfer a remaining grant to a new owner subject to a new agreement
- 25) Demolition: Any situation that may result in the demolition of a property that is the subject of a TIEG will result in discontinuation of the program and may require repayment of the benefit received
- 26) Funding Availability: The City of Waterloo is not bound to accept any application. Funding is available on a first come, first served basis. Eligibility for a program does not guarantee approval
- 27) Additional Evaluation: The City may require a more comprehensive evaluation in situations where estimated project costs exceed \$1,000,000 and/or where the financial request includes a Tax Increment Grant. All TIEG grants are subject to Council approval
- 28) Subsequent Applications: A property that has been the successful recipient of an Uptown CIP may not apply for another grant unless five (5) years has passed. If the owner has received less than the \$25,000 program maximum, they may apply for subsequent works up to the program maximum

## IMPLEMENTATION

### How to Use This Manual

This manual outlines financial assistance programs available to property owners and businesses in Uptown Waterloo. Each program has specific requirements and funding limits. Before applying, please review the General Program Requirements that apply to all programs, consult with CIP program staff and other City departments regarding any permit or license requirements.

**Important Note:** All programs are subject to available funding as approved by City Council. Applications are reviewed on a first-come, first-served basis.

### Before You Apply

- 1) Review the General Program Requirements
- 2) Confirm your project meets the specific program criteria
- 3) Schedule an initial meeting with CIP program staff by emailing
- 4) Consider consulting with relevant experts (architects, engineers, electricians, accessibility, heritage, etc.)
- 5) Check if you need any additional City or agency permits or approvals for your project

## Funding Available

All programs are subject to available funding. Early application is recommended.

## Application Process

The applicant will be required to submit a completed application along with required supporting documentation in accordance with the process outlined below. If an application is not complete staff will contact the applicant to request the necessary information. The following is an outline of the process:

- 1) Pre-consultation meeting with City staff to confirm program eligibility and required supporting application materials and additional required permits.
- 2) Submit a complete application online with required supporting documentation (e.g. drawings, estimates, photos, studies or assessments and permits (when required).
- 3) Typical supporting documentation may include:
  - Description of business/project and justification for the project
  - City of Waterloo Business License (if applicable)
  - Minimum of one estimate for proposed project works
  - Drawings and studies as may be required (e.g. energy audit)
  - Copy of any permit applications made
  - Property owners must provide a copy of proof of ownership of the property where the CIP project will be taking place
  - Tenants of a property must provide a copy of a dated lease to the property being rented (minimum 3 years; new and/or existing businesses). Applicants who have a lease term of less than 3 years must obtain confirmation of an extended lease to the tenant through the property owner
  - Photos of the project area before any work
  - Other information to assess applications

## Review Process

- Review is undertaken by staff for completeness and eligibility.
- Priority - Applications are reviewed on a first-come, first-served basis, subject to available funding to the CIP. Funding levels are set annually by Council, and the City is not obligated to fund all eligible applications. Programs may be paused or discontinued at Council's discretion. TIEG applications are subject to Council approval.
- Decision and Agreement - The Executive Director of Economic Development or their delegate will make the final approval of an application. The service standard for a decision to an applicant within four (4) weeks of complete application, or final issuance of required permits (whichever is later).
- A TIEG Application will have an extended approval period due to the complexity of the application and requirement for Council approval. The target service standard for a TIEG application will be three (3) months from the application date.

- Once the application is approved the conditions of approval, the amount awarded, additional documentation and agreements will be required and signed and the expected process for payment upon completion will be outlined.
- Permits and Licenses: all required licenses and permits must be obtained before commencing any works.

## Payment

Upon project completion, the applicant must submit all required documentation to demonstrate completion of the project in accordance with the approved grant.

Typical supporting documentation will include:

- Invoices and proof of payment (e.g. receipts signed by the company, cancelled cheque images or credit card/bank statements showing payment)
- Copies of all required permits outlining terms and conditions (e.g. heritage permit, sign permit, building permit)
- Demonstrated fulfillment of any permit conditions
- Photos of the complete project and a project testimonial
- Declarations
- Other documentation requested by the City to demonstrate compliance

The City will review all documentation provided and will issue payment upon all conditions being met. Payments may take at least 30 (thirty) days from the date that staff provide verification of project completion and submit payment request to Accounts Payable.

## Monitoring and Reporting

This CIP is not intended to be a static document. It is intended to be a proactive and responsive plan to support development and targeted core-area improvements within the Project Area.

### How We Track Success

The City will monitor these programs by tracking:

- Number of applications
- Employment space created or renovated
- Affordable housing units created
- Property tax assessment changes
- Number and value of grants provided
- Total private investment leveraged
- New office or commercial units added
- New businesses attracted (where possible)
- Number of buildings with accessibility enhancements
- Number of vacant units occupied

## Program Changes

The Council of the City of Waterloo may discontinue programs or make minor revisions to the Uptown Waterloo CIP without formal amendment to this Plan. Council will approve

budget for this program in alignment with City of Waterloo budget (1 and 3 year). Council will approve TIEG applications through a report to council.

Minor changes for the purpose of effectively administering the program (e.g. application process, intake windows, forms, website content, legal agreements, contracts and minor adjustments to clarify eligibility) may be adjusted without Council approval or amendment to this Plan.

Significant changes to the CIP may trigger requirements under the Planning Act, including public notice, Council approval and Ministry approval. Some changes that alter the intent, scope or legal structure of the CIP may be deemed to be significant may include: changes to CIP boundaries, introduction of new financial programs, changing the purpose or goals of the CIP, substantially altering eligibility criteria (e.g. removing categories of properties or expanding types of projects from exterior to include interior).

Be sure to check the City website for the most current information on the CIP.

## CIP PROGRAM DETAILS

### Commercial and Heritage Façade Improvement Grant Program

---

#### Purpose:

Help businesses and commercial or mixed-use commercial property owners and tenants to improve the exterior of their buildings and storefronts to improve the aesthetic appeal, historic character and overall vibrancy of Uptown streetscapes.

#### Funding:

- Grant equal to 50% of eligible costs
- Up to \$10,000 per street-facing façade; or
- Up to \$15,000 for properties improving both street-facing façades on a corner lot
- An additional \$5,000 for heritage designated properties

#### Program-Specific Requirements:

In addition to complying with all general requirements, an application may require some additional program-specific requirements, as determined by the project scope of work:

- Eligible façade works must be street facing.
- Back-of-house safety upgrades and alleyway activations listed above may be eligible even if not visible from the street
- Any patio infrastructure must align with the City of Waterloo Patio Program requirements (in addition to all permits/approvals required).
- For properties designated under the Ontario Heritage Act, all eligible works must also conform to the Standards and Guidelines for the Conservation of Historic Places in Canada and City of Waterloo Urban Design Guidelines.
- Colour selections/designs for alleyway activation must be reviewed and approved by City staff.
- Signage and/or any work that constitutes a mural must comply with the City's Sign By-law (Sign Zone F – Uptown). Murals specifically may require:
  - An application to the Sign Variance Committee; and
  - A variance through the City's IPPW department and approval by the City's Public Art Committee
  - Applicants are encouraged to hire local artists, when possible

#### Eligible Expenses:

- Painting, repair, rehabilitation or replacement of exterior façade materials and/or treatments
- Replacement/repair of exterior materials (brick, masonry, cladding)
- Repair/replacement of doors, windows, porches
- Repair/replacement of architectural details such as cornices, parapets, soffit/facia, eaves



- Storefront upgrades (display windows, canopies, awnings, entrances)
- Permanent hard landscaping (walkways) up to 15% of the grant
- Signage (that conforms to the sign by-law) up to a maximum of \$3,500
- Commercial safety/CPTED improvements to reduce crime and improve security (e.g., exterior lighting, smash-resistant doors/windows, or alleyway activation through vibrant, bright colour façade painting)
- Permanent patio infrastructure that abuts a street or alleyway (e.g. concrete barriers, patio deck infrastructure and/or fencing). *Note: patio chairs, tables, umbrellas, heater and other temporary fixtures are not eligible*
- Other exterior repairs/improvements as approved by the Executive Director of Economic Development or their delegate
- In the case of heritage properties - residential heritage-designated properties may be eligible

## Fee and Study Grant Program

---

### Purpose:

The purpose of the fee and study grant program is to support renovations and small expansions that facilitate energy efficient, accessible, historically appropriate and high-quality design by offsetting City application fees and the cost of professional studies/drawings for Uptown commercial or heritage restoration construction projects.

### Funding:

- Grant covers up to 50% of eligible City application/permit fees and/or other site-specific plans, documents, design and/or feasibility studies needed to support a potential CIP project/improvement, to a maximum of \$5,000 per property/project.

### Program-Specific Requirements:

In addition to complying with all general requirements, an application may require some additional program-specific requirements, as determined by the project scope of work:

- Eligible projects must be associated with a project approved under another CIP program listed within this guide (Commercial and Heritage Building Façade Improvement Project, Accessibility Enhancement, Sustainability and Climate Resilience or Commercial Interior or Vacancy Grants)
- Eligible projects must be within a commercial, mixed-use or heritage building and required to support the proposed improvement, and must contribute to a larger eligible improvement
- Studies/drawings must directly support the CIP-funded project and reflect the final scope submitted for approvals
- All studies/drawings must meet applicable City standards/guidelines and be submitted electronically for City review and records
- This program is not intended to support ongoing licensing and/or fees such as for a business, AGCO and/or patio licenses

### Eligible Fees:

- Committee of Adjustment (consent, minor variance)
- Site Plan Application Fee (Major or Minor)
- Rental Housing Protection Act (Condominium Conversion)
- Building Permit (including permits for façade improvements and patio installation)

### Eligible studies:

All studies must be prepared by a qualified professional acceptable to the City and be required to undertake a proposed CIP project. All studies must be submitted in electronic pdf format. For a study to be eligible it must be approved as acceptable to the City by the reviewing department/division:

- Urban design studies/drawings
- Professional architectural or engineered drawings required for building permits
- Engineering Assessments (including structural assessment)

- Heritage Impact Assessment
- Energy audits or Greenhouse Gas (GHG) assessments
- LEED and/or CAGBC Zero Carbon Building Standard Certification Fees
- Accessibility audits
- Fire Safety Plan
- Community Prevention Through Environmental Design (CEPTD) Audit

---

## Accessibility Enhancement Program

---

### Purpose:

Many of the City's older buildings pre-date current accessibility standards. The Accessibility enhancement program is intended to encourage commercial or mixed-use commercial property owners and tenants to improve exterior accessibility of their business, and to encourage commercial businesses to improve interior spaces by pursuing accessibility improvements through universal design standards.

### Funding:

- Grant covers 75% of eligible costs
- Up to \$15,000 per project
- Subject to approval, applicants may request a Notice for Consideration (email/letter) before project completion requesting coverage of up to 100% of approved expenses

### Program-Specific Requirements:

In addition to complying with all general requirements, an application may require some additional program-specific requirements, as determined by the project scope of work:

- Applicants must consult with appropriate City departments to determine if their CIP project requires any approvals, permits (e.g. building, heritage, signage) or clearances from the City or external agencies
- Eligible projects include improvements to existing commercial business, a change in use to commercial, adaptive reuse of an existing building to facilitate accessibility retrofits to existing commercial, institutional and mixed-use buildings
- All accessibility improvements undertaken under this program must comply with the Accessibility for Ontarians with Disabilities Act (AODA) and Ontario Building Code (OBC) requirements and City standards in force and effect at the time of application
- Projects that propose the demolition or removal of heritage attributes will be considered ineligible
- Project meets the assessment to be barrier-free and confirmed during building permitting stage
- For properties designated or listed under the Ontario Heritage Act, works must also follow the Standards and Guidelines for the Conservation of Historic Places in Canada and obtain any required heritage permits or approvals
- Program staff may consult with Grand River Accessibility Advisory Committee (GRAAC) or City of Waterloo Accessibility staff to support project assessment

Tip: Consider consulting local accessibility experts/organizations when planning improvements (e.g., physical layout, fixtures, universal washrooms, signage, and wayfinding).

The document's General Program Requirements apply to this program.

**Eligible Expenses:**

- Barrier-free entrance to property (widening doors and modifying entrances, ramps, and automatic door openers)
- Adaptive solutions such as widening doors, electronic doorbells, installing guards and/or handrails and visibility strips
- Non-slip surfacing at entrances/paths to the business
- Interior bathroom accessibility upgrades including improvements such as installing automatic door openers, lowering sinks, installing grab bars or accessible fixtures (existing bathrooms only)
- Installation of specialty equipment such as elevators, accessible lifts
- Installing anti-glare window treatments
- Braille or tactile signage, directional/wayfinding signage
- Other barrier-removal works that improve accessibility, as approved by the City

---

## Sustainability and Climate Resilience Program

---

### Purpose:

Promote sustainable design, energy efficiency, and climate resilience upgrades in existing Uptown commercial and mixed-use commercial buildings. The Sustainability and Climate Resilience program supports projects that reduce GHGs, improve resilience, and/or lower energy consumption.

### Funding:

- Grant covers up to 50% of eligible costs
- Up to a maximum of \$10,000 per project

### Before You Start

- Check the appendices to reference your type of project for some idea of projects that may require additional permits from the City or other agencies. Please consult with City of Waterloo Building, Planning departments prior to starting your project to determine specific requirements and if the project will require a Building permit.
- This program is not intended to replace but to complement any Provincial or Federal government programs that support energy efficiency improvements such as the Save On Energy program (Save on Energy for Small Business, Save on Energy for Restaurants, and Save on Energy Instant Discounts for Commercial Lighting at participating dealers). Applications to this program must report if the applicant is pursuing any additional funding programs to cover and/or go towards expenses outlined within the CIP project scope.
- Any awarded funding during the CIP project lifecycle must be reported to the City. Approval of additional funding from other programs will result in any approved CIP funding to be adjusted accordingly.

### Program-Specific Requirements:

In addition to complying with all general requirements, an application may require some additional program-specific requirements, as determined by the project scope of work:

- Upgrades must be permanent and directly support GHG reduction, climate resilience, or improve energy efficiency
- Solar and EV projects must acquire the necessary permits and electrical approvals (e.g. ESA approvals) from external agencies and/or contractors
- Solar projects may require city building permit approvals, as determined by the project scope and structural capacity of the building (size of the project to the building and load bearings)
- For properties designated or listed under the Ontario Heritage Act, works must also follow the Standards and Guidelines for the Conservation of Historic Places in Canada and obtain any required heritage permits or approvals
- For energy-efficiency projects that require an energy audit, applicants must submit it as part of the CIP submission process as a condition prior to receiving approved CIP funds

**Eligible Expenses:****Clean Energy & Energy Efficiency Improvements**

- Energy-efficient windows and doors – verified Energy Star certified models
- Electric heat pump conversion projects
- Insulation upgrades to achieve updated building performance requirements
- Retrofitting heritage windows with dual or triple-paned glass, re-glazing windows or storm windows to improve heritage windows for thermal performance
- Air sealing improvements
- Heat recovery measures
- Electrical upgrades for the purposes of installing heat induction measures
- On-demand electric water heater
- Smart thermostats/controls and energy management technologies to improve efficiency (excluding LED lighting upgrades)
- Installation of on-site renewal energy systems, including rooftop solar photovoltaic systems or solar thermal systems

**Other Climate Resilience, Environmental and Resource Sustainability Improvements**

- Reflective (white) roof membranes to reduce heat gain/heat island effect
- EV chargers (Level 2) within non-accessible designated parking spots available to the public
- Secured bicycle parking (staff and/or public)
- Other upgrades/improvements as approved by the Executive Director of Economic Development or their delegate.

## Commercial Interior and Vacancy Improvement Program

---

### Purpose:

The purpose of the Commercial Interior and Vacancy Improvement Grant Program is to stimulate the reactivation of vacant or underutilized commercial spaces by providing financial assistance for leasehold improvements and interior retrofits that support the establishment of new businesses. By reducing upfront renovation costs for property owners and tenants, the program aims to accelerate business attraction, enhance the vitality of uptown by turning under-utilized spaces into commercial uses.

### Funding:

- Grant covers up to 50% of eligible costs
- Up to a maximum of \$10,000 per project

### Program-Specific Requirements:

In addition to complying with all general requirements, an application may require some additional program-specific requirements, as determined by the project scope of work:

- A pre-application inspection may be required to confirm the scope and eligibility
- Upgrades must be permanent and convert vacant commercial interior space to enable a new commercial use or to rehabilitate an existing commercial space for continued commercial use
- Applicants must be compliant with any municipal/provincial/federal permit requirements (e.g. building permit, Electrical Safety Authority Permit) that may be required
- Any changes proposed within a commercial heritage-designated property must conform to the Standards and Guidelines for the Conservation of Historic Places in Canada and obtain any required heritage permits or approvals
- Residential and/or proposed office uses are not eligible

### Eligible Expenses:

- Structural or Building Code compliance upgrades required for occupancy
- Electrical and plumbing system upgrades including panel and wiring upgrades, new plumbing, addition of new (accessible) washrooms. The bathroom does not have to be accessible if there is an existing accessible washroom
- Construction of interior walls (including framing, drywall and painting)
- Interior structural repairs
- Interior finishes such as flooring and/or new ceilings
- Built-in millwork (e.g. counters, display units, shelving)
- Commercial Kitchen improvements for food-related uses (built in cabinets, fire suppression hoods)
- Fire-compliance upgrades (e.g. sprinkler systems, wired in emergency lighting, fire separation)
- Demolition (when part of a larger eligible project and does not exceed \$2500)



- Other permanent interior improvements at the discretion of the Executive Director of Economic Development or their delegate

**Ineligible Expenses:**

- Lighting fixtures
- Appliances
- Clothing racks
- Furnishings or removable fixtures
- Equipment (POS systems, refrigerators etc.)
- Improvements to non-commercial or residential units

## Major Activity Grant Program

---

### Purpose:

To promote large reurbanization projects that include affordable housing uses and/or non-residential uses that include an office employment component. This program is also intended to support and off-set the costs associated with compliance with environmental sustainability and, where applicable, heritage conservation criteria. This program provides a financial incentive that reduces the property tax increase that can typically result from reurbanization projects and is also designed to assist in securing project financing.

### Description:

The Major Activity Grant Program provides that a tax increment grant (TIG) would be offered by the City. A TIG is a grant equal to the full amount, or a portion of the amount of the estimated property tax increase after a property is redeveloped and reassessed. The increase in taxes, or 'tax increment', is calculated by subtracting the municipal portion of property taxes before reassessment from the municipal portion of property taxes after reassessment. The City may provide a grant equal to any proportion of the increment for any length of time that Council deems is appropriate. The tax increment does not include any increase/decrease in municipal taxes due to a general tax rate increase/decrease, or a change in assessment for any other reason.

The Major Activity Grant Program will provide for a TIG on a "pay-as-you-go" basis. The approved applicant would first construct and complete the reurbanization project. This program will then provide an annual grant equal to a percentage of the municipal property tax increase for up to 10 years following completion of an eligible project where that project creates an increase in assessment, and therefore an increase in property taxes. The grant will be paid annually once the eligible project is complete, building inspection has taken place, the property has been reassessed, and the new property taxes have been paid in full for the year

The availability of the grant and the amount of the grant to be paid out by the City on an approved project is tied to as-built project performance of that project. As-built performance of a project is evaluated by the City using criteria as set out in Appendix "D" of this CIP, including:

- The inclusion of affordable housing land uses or office employment land uses as a component of the development;
- LEED certification or other sustainable design/construction standards recognized by the City; and,
- Where applicable, conformity with Standards and Guidelines for the Conservation of Historic Places in Canada

The City may elect to establish a maximum grant that can be paid under this program per application/project.

Program Requirements:

Applicants are eligible to apply for funding under this program, subject to meeting the general program requirements, the following program requirements, and subject to the availability of funding as approved by Council:

- a) The following types of projects are considered eligible to apply for funding under this program:
  - i. Repair, renovation, expansion or redevelopment of existing buildings where said activity results in an increase in the assessment value and taxes on the property; or,
  - ii. New buildings on vacant lots where said activity results in an increase in the assessment value and taxes on the property; and
  - iii. Said activity referred to in either item i) or item ii) above results in a minimum of 5,000 square feet of new or renovated building floor area, provided further that:
    - A minimum of 10% of the residential units are provided as affordable rental or ownership housing, with no fewer than 10 affordable units provided; and/or
    - The building floor area provided for office employment uses within the building has a minimum Floor Space Ratio (FSR) of 1.
- b) If during the grant period, a building receiving a Tax Increment Grant is demolished, all grant payments shall cease, and the City reserves the right to require immediate repayment of the grant payments

## Municipal Land Development Opportunities: Property Acquisition, Disposal, Investment and Improvement Program

---

As outlined in the Municipal Incentives Toolkit section of this CIP, there is a set of specific grant programs designed to incent private sector development, redevelopment and revitalization in the Project Area. The purpose of the Municipal Land Development Opportunities program is to complement the incentives toolkit by establishing a general, high-level framework that allows the City to directly participate in and lead development, redevelopment and revitalization initiatives that reinforce and improve the economic vitality of Uptown as a thriving business centre and innovation hub with strong employment and residential growth.

Under Section 28(6) of the Planning Act:

“For the purpose of carrying out a community improvement plan that has come into effect, the municipality may,

- (a) construct, repair, rehabilitate or improve buildings on land acquired or held by it in the community improvement project area in conformity with the community improvement plan, and sell, lease or otherwise dispose of any such buildings and the land appurtenant thereto;
- (b) sell, lease or otherwise dispose of any land acquired or held by it in the community improvement project area to any person or governmental authority for use in conformity with the community improvement plan.”

### Description of the Strategy

Under the Municipal Land Development Opportunities Program, the City may utilize a range of options to acquire or to attract key investment and may include public-private ventures. The City may acquire, invest, improve or dispose of municipal property to support key CIP objectives of this plan.

The Municipal Land Development Opportunities Program may include community improvement projects that address the goals of this CIP and the Official Plan that seek to advance Uptown as a major focal point and destination for investment in institutional and Region-wide public services, as well as residential, commercial, employment, social, cultural, entertainment, recreational, and accommodation purposes. Such projects may include but are not necessarily limited to:

- Facilitate development or acquisition of community, cultural, or public-serving facilities that contribute to economic or social vitality
- Facilitating the creation of a community arts hub that could include uses such as museums, theatres and/or studio and incubator space for artists
- Facilitating the creation of an innovation hub that could include space to support start-up businesses in key target sectors such as technology (quantum, AI) finance, health and health technology, aerospace or other target sectors as defined by the City of Waterloo Economic Development Strategy
- Developing parking structure(s)

- Developing tourism generating infrastructure (e.g. conference centre)
- Land acquisition and disposition tools may be used to support the remediation and redevelopment of brownfield sites, including possible public-private partnerships or discounted land transfers.
- Supporting a range of housing types that are affordable to a range of income groups, including affordable housing
- Supporting the conservation and adaptive re-use of cultural heritage resources
- Supporting the development of open spaces that are accessible to the public and may be located on public or private lands

Consistent with the provisions of section 28(3) and 28(6) of the Planning Act, Council may undertake any, or a combination of, the following after the CIP has been approved and comes into effect:

- Acquire, hold, clear, grade or otherwise prepare land;
- Construct, repair, rehabilitate or improve buildings on land acquired or held by the City;
- Sell, lease, or otherwise dispose of any land and buildings acquired or held by it in conformity with the CIP

To facilitate the Municipal Land Development Opportunities CIP program, upon approval of this Plan, the City may use all of its powers under the Municipal Act, 2001, and other applicable statutes and regulations, in order to lead or participate in the initiatives outlined in this program and consideration of the anticipated public benefit of the proposed development, its alignment with CIP goals, and its ability to proceed within a reasonable timeframe. Projects will assess a number of key criteria that may include:

- Demonstrated need or viability gap
- Strength of development concept (design, land use, sustainability)
- Community or economic benefit (e.g., job creation, public access)
- Project readiness and timeline for delivery
- Partnerships with non-profit or institutional sectors

## Criteria

To achieve a land transaction for the purpose of carrying out the Community Improvement Plan, the municipality may sell, lease or otherwise dispose of land and buildings acquired or held by it at its disposal, and on such terms as it considers desirable. Any such transactions will be subject to Council approval and must be tied to clear performance outcomes through development agreements or other legal mechanisms. In determining eligibility, the City will consider the anticipated public benefit of the proposed development, its alignment with CIP goals, and its ability to proceed within a reasonable timeframe.

# Appendix A

## Major Activity Grant Program (Tax Increment Equivalent Grant)

### Grant Application Evaluation Matrices

Table D-1 Employment Uses

As-Built Project achieves a minimum overall building floor area of 5,000 square feet; AND	Amount of Grant as (Percentage of Municipal tax increment associated with employment uses)	Duration of Grant
<p>Level 1 Building floor area for office employment has a minimum Floor Space Ratio (FSR) 1.0</p> <p>(no designated heritage resource and no sustainable design/construction certification)</p>	80%	6 years
<p>Level 2 Building floor area for office employment has a minimum Floor Space Ratio (FSR) 1.0</p> <p>AND</p> <ul style="list-style-type: none"> <li>Includes either a designated heritage resource; OR,</li> <li>Achieves LEED certification or other sustainable design/construction standards recognized by the City</li> </ul>	90%	8 years
<p>Level 3 Building floor area for office employment has a minimum Floor Space Ratio (FSR) 1.0</p> <p>AND</p> <ul style="list-style-type: none"> <li>Includes a designated heritage resource; AND,</li> </ul>	100%	10 years

<ul style="list-style-type: none"> <li>Achieves LEED certification or other sustainable design/construction standards recognized by the City</li> </ul>		
---	--	--

Table D-2 Affordable Housing Uses

As-Built Project achieves a minimum overall building floor area of 5,000 square feet; AND	Amount of Grant as (Percentage of Municipal tax increment associated with all residential units included in the building)	Duration of Grant
<p><b>Level 1</b> A minimum of 10% of residential units provided in a residential or mixed-use building are affordable as defined by this CIP, with no fewer than 10 affordable residential units</p> <p>(no designated heritage resource and no sustainable design/construction certification or standards)</p>	50%	6 years
<p><b>Level 2</b> A minimum of 10% of residential units provided in a residential or mixed-use building are affordable as defined by this CIP, with no fewer than 10 affordable residential units</p> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>Includes either a designated heritage resource; OR,</li> <li>Achieves LEED certification or other sustainable design/construction standards recognized by the City</li> </ul>	50%	8 years

<p>Level 3 A minimum of 10% of residential units provided in a residential or mixed-use building are affordable as defined by this CIP, with no fewer than 10 affordable residential units</p> <p>AND</p> <ul style="list-style-type: none"><li>• Includes a designated heritage resource; AND,</li><li>• Achieves LEED certification or other sustainable design/construction standards recognized by the City</li></ul>	50%	10 years
---	-----	----------



ATTACHMENT 2:  
UPTOWN CIP DESIGNATION BY-LAW ##



# THE CORPORATION OF THE CITY OF WATERLOO

## BY-LAW NO. 2025 –

### BY-LAW TO DESIGNATE A COMMUNITY IMPROVEMENT PROJECT AREA FOR THE CITY OF WATERLOO

**WHEREAS** Section 28(1) of Part IV of the *Planning Act*, R.S.O. 1990, c. P.13 (the "*Planning Act*"), defines a "community improvement project area" as "a municipality or an area within a municipality, the community improvement of which in the opinion of council is desirable because of age, dilapidation, overcrowding, faulty arrangement, unsuitability of buildings or for any other environmental, social or community economic development reason";

**AND WHEREAS** Section 28(2) of the *Planning Act* empowers the council of a municipality where there is an official plan in effect that contains provisions relating to community improvement, to designate the whole or any part of the municipality covered by the official plan as a community improvement project area;

**AND WHEREAS** the City of Waterloo Official Plan contains community improvement policies which permit the entire City to be designated as a community improvement project area;

**AND WHEREAS** the Council of the Corporation of the City of Waterloo deems it expedient and in the interest of the municipality to designate a community improvement project area for the purposes of supporting community improvement objectives and goals for the Uptown area;

### THEREFORE THE MUNICIPAL COUNCIL OF THE CORPORATION OF THE CITY OF WATERLOO ENACTS AS FOLLOWS:

1. By-Law No. 2015-046 of the City of Waterloo is hereby repealed in its entirety.

2. The subject lands shown on Schedule "A" to this By-law are hereby designated as a community improvement project area to be known as the "Uptown Community Improvement Project Area".
3. This By-law shall come into force and effect on the date it is enacted.

**Enacted** this \_\_\_\_\_ day of \_\_\_\_\_, 2025.

Signature

---

**D. McCabe, Mayor**

---

**J. Finley-Swaren, City Clerk**

## ATTACHMENT 3:

## UPTOWN CIP ADOPTION BY-LAW ##



# THE CORPORATION OF THE CITY OF WATERLOO

## BY-LAW NO. 2025 –

### BY-LAW TO ADOPT AN UPDATED UPTOWN COMMUNITY IMPROVEMENT PLAN FOR THE CITY OF WATERLOO

**WHEREAS** By-Law No. 2025 - \_\_\_\_\_, being a By-Law to designate the Uptown Community Improvement Project Area, was passed by the Council of the Corporation of the City of Waterloo on the \_\_\_\_ day of \_\_\_\_\_, 2025, pursuant to its authority under Section 28(2) of Part IV of the *Planning Act*, R.S.O. 1990, c. P. 13 (the "*Planning Act*");

**AND WHEREAS** the Council of the Corporation of the City of Waterloo has provided for the preparation of the Uptown Community Improvement Plan, pursuant to its authority under Section 28(4) of the *Planning Act*;

**AND WHEREAS** the Uptown Community Improvement Plan conforms to the City of Waterloo Official Plan;

**AND WHEREAS** the Council of the Corporation of the City of Waterloo held a Public Meeting with respect to the Uptown Community Improvement Plan on \_\_\_\_\_, 2025, pursuant to its authority under Section 17 of the *Planning Act*;

### THEREFORE THE MUNICIPAL COUNCIL OF THE CORPORATION OF THE CITY OF WATERLOO ENACTS AS FOLLOWS:

1. By-Law No. 2015-047 of the City of Waterloo is hereby repealed in its entirety.
2. The Uptown Community Improvement Plan consisting of the attached text, maps, plans, figures, illustrations and tables is adopted and is attached hereto as Schedule "A".
3. This By-law shall come into force and effect on the date it is enacted.

**Enacted** this \_\_\_\_\_ day of \_\_\_\_\_, 2025.

Signature

---

**D. McCabe, Mayor**

---

**J. Finley-Swaren, City Clerk**

## ATTACHMENT 4:

## LETTER OF SUPPORT – UPTOWN WATERLOO BIA



100 Regina Street S, Suite 160 Waterloo, ON N2J 4P9

T 519.885.1921

E [uptownwaterloobia@waterloo.ca](mailto:uptownwaterloobia@waterloo.ca)

[www.uptownwaterloobia.com](http://www.uptownwaterloobia.com)

Thursday, November 13, 2025

Mayor Dorothy McCabe and Members of Council  
City of Waterloo  
100 Regina Street South  
Waterloo, ON N2J 4A8

**Re: Endorsement of the Uptown Community Improvement Plan (CIP)  
Recommendations**

Dear Mayor McCabe and Members of Council,

On behalf of the Uptown Waterloo Business Improvement Area (BIA), we are writing to express our support for the proposed updates to the Uptown Community Improvement Plan (CIP) as presented by the Economic Development Department.

As the organization representing over 450 businesses in the heart of Waterloo, we recognize the critical role that targeted financial incentives play in supporting small businesses, preserving heritage assets, and encouraging sustainable redevelopment.

We are particularly encouraged by the following elements of the proposed CIP:

- **Expanded support for small businesses** through programs such as the Commercial Interior and Vacancy Improvement Grant and the Accessibility Enhancement Program, which will help reduce barriers to entry and support inclusive growth.
- **Focus on sustainability and climate resilience**, aligning with the City's broader climate action goals and helping businesses modernize in environmentally responsible ways.
- **Support for adaptive reuse and Intensification**, which will help revitalize underutilized spaces and attract new investment to Uptown.
- **Flexibility and responsiveness** in program design, including the ability to

combine grants and the inclusion of a Municipal Land Development Opportunities Program to address strategic redevelopment needs.

- **Commitment to heritage preservation**, with grants that recognize the unique challenges and costs associated with maintaining and restoring heritage-designated properties.

We appreciate the City of Waterloo's engagement with the BIA and other stakeholders throughout the CIP review process. We urge Council to approve the proposed CIP and look forward to continuing our partnership with the City of Waterloo to support its successful implementation.

Sincerely,  


Jeyas Balaskanthan  
Executive Director  
Uptown Waterloo Business Improvement Area  
C: 519-722-8940  
[Jeyas.balaksanthan@waterloo.ca](mailto:Jeyas.balaksanthan@waterloo.ca)

**ATTACHMENT 5:****LETTER OF SUPPORT – GRAND RIVER ACCESSIBILITY ADVISORY (GRAAC)  
COMMITTEE**

October 27, 2025

City of Waterloo Council  
c/o Economic Development Office  
100 Regina Street South  
Waterloo, ON N2J 4A8

Dear Mayor Members and Members of Council,

As the Chair of the Built Environment Subcommittee for the Grand River Accessibility Advisory Committee (GRAAC), I am sharing strong support for the proposed Accessibility Stream in the City's updated Community Improvement Plan (CIP). This potential stream is an important movement toward accessibility not being treated as an afterthought, but as essential for economic development and community inclusion. The potential 75–25 funding model provides increased opportunity alongside broadening the range of eligible accessibility improvements for businesses.

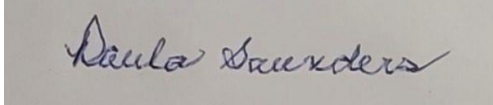
By making accessibility a core area of investment, the CIP can:

- Create a clear choice for applicants to improve accessibility.
- Broaden the scope beyond minimum building code requirements to include a wider range of accessibility products/features that align with the City's Get READ! Plan and the Accessibility for Ontarians with Disabilities Act.
- Signal locally that accessibility is both a human right and a driver of economic growth; allowing more people to access and enjoy businesses in Waterloo.

GRAAC is very aware that residents and visitors experience persistent barriers in the built environment that limit participation and contribute to exclusion. This new stream represents a proactive municipal tool to help address those gaps, while supporting businesses in making meaningful upgrades. This will strengthen Waterloo's reputation as a welcoming and accessible city.

I urge Council to adopt and implement the change for accessibility in the CIP. I welcome the opportunity to continue to provide input as the program evolves.

Sincerely,

A rectangular box containing a handwritten signature in blue ink that reads "Paula Saunders".

Paula Saunders  
Chair, Built Environment Sub-Committee  
Grand River Accessibility Advisory Committee



## ATTACHMENT 6:

## LETTER OF SUPPORT – SUSTAINABILITY ADVISORY COMMITTEE (SAC)



Wednesday, November 5, 2025

Mayor McCabe and Members of Council  
City of Waterloo  
100 Regina Street South  
Waterloo, Ontario  
N2J 4A8

Dear Mayor McCabe and Members of Council,

**Re:** Uptown CIP

Please be advised that on October 16, 2025, the Sustainability Advisory Committee (SAC) passed the following motion:

Moved by Tova Davidson, Seconded by Peter Heywood,

“That at their meeting on October 16, 2025, SAC moved to support in principle the 2025 CIP proposal, particularly as it relates to climate change and resilience.”

Motion Carried, none opposed.

Respectfully Submitted,

Heather Leveille  
Chair, Sustainability Advisory Committee (SAC)

Copy to: Economic Development