

Kleinburg Economic Development Strategy Update from 2011 Strategy

Feb 2016



T H R E E
S I X T Y

retail

Kleinburg Village Status Update 2016

- Goal is to gauge the Kleinburg BIA and the City of Vaughan in terms of the meeting the goals and objectives laid out in the Kleinburg Economic Development Strategic Plan (June 2011)
- High level report documenting changes in the demand and supply characteristics of the retail area and status update on action items



Summary

- Successes
 - Increased communication and functionality of the BIA
 - Favourable economics to support retail sales
 - Continued investment by property owners and retailers to go after sales growth opportunities
 - City committed resources including staff person to guide organizational elements
 - Well defined vision, brand, and website that combines the unique strengths of the area and economic fundamentals
 - Increased partnerships and collaboration
- Issues and Opportunities Moving Forward
 - Concern lack of growth in the 40 to 49 year old target market; retailers adjusted to cater to younger families
 - Peer reviews – while strengthened identify for Kleinburg; low mentions as a Vaughan area
- Achieved very good results from 2011 to 2016 on the first three action items:
 - Position KBIA as a Catalyst for Change
 - Establish Kleinburg as a Meeting Place
 - Be Investment Ready
- Still work on final two action items
 - Placemaking
 - Eliminate Barriers to Development – parking, heritage, built form, incentives, transportation

Update Study Methodology

- Compare trade area demographics with current 2015 estimates
- Conduct retail audit on business type, size, and overall quality assessment
- Conduct interviews with retailers, property owners, City staff, and stakeholders to assess changes fromn 2010 to 2015
- Collect relevant data on building permits, assessed value, pedestrian counts, and development applications to assess level of investment
- Review retail rents
- Assess recommendations to determine level of completion

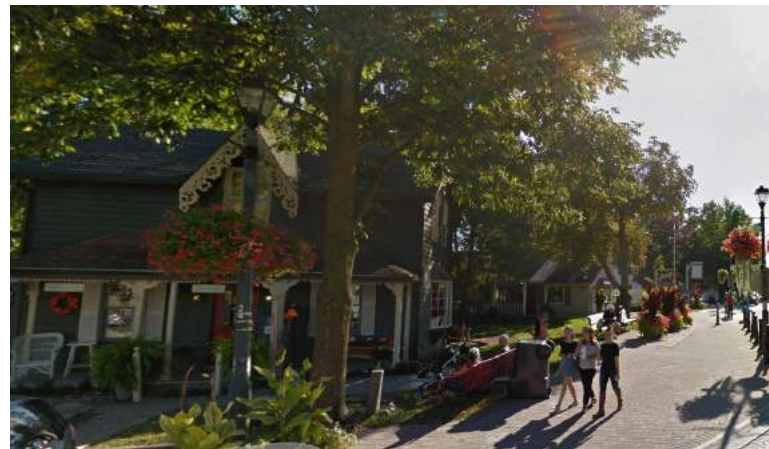
Kleinburg Village has Become a Hub of Activity, a True Meeting Place



Kleinburg Target Markets: Younger Adults



Abundant People Gathering Places in Both Private and Public Realm



Study Area and BIA Boundary



Retailer Interview Feedback

- 18 retailer/service providers and property owner interviews
- 6 stakeholder interviews
- Questions Asked
 - Overall, has your business improved, stayed the same, or declined in last five years OR since you opened?
 - What do you attribute the change to?
 - Have your customers changed in the past five years OR since you opened? And if so, how have they changed?
 - Describe your core customers?
 - Where do you see your business in the next two to five years?
 - Are you involved with the BIA?
 - How has the BIA changed or improved? Specific examples
 - Where would you like to see the BIA focus on in the next two to five years?
 - Any comments on working with the City and opportunities for improvement?

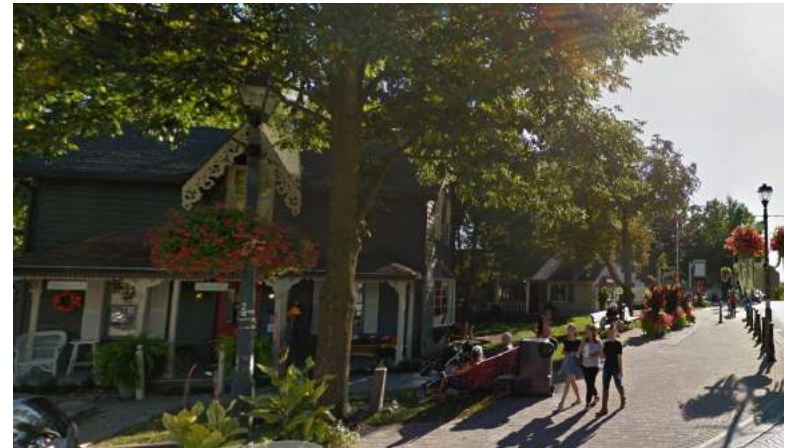
Retailer Performance

- The majority of retailers indicated that sales have increased. This includes both retailers and service providers. The level of investment by retailers and property owners in Kleinburg reflects the both past sales growth and sense of optimism for continued future growth. Even retailers that have been open for a short period indicated that relocating their business to Kleinburg has resulted in better sales.
- A select number of retailers indicated that sales were stable or stagnant. However, they were looking at ways to reconnect with consumers and changing the focus of their businesses.
- All businesses have seen the changes in the local area demographics. This includes the nearby population growth, the number of younger families in the area, the greater diversity of the population and as indicated, they have created or adjusted their business plans to take advantage of this opportunity.



What Do You Attribute Success to

- For retailers who have moved to Kleinburg Village from another location, they indicated that they performed the required due diligence and assessed the gaps in the marketplace.
- Long established businesses have identified changing demographics in the local area and have adjusted their merchandise mix accordingly.
- Many business remarked that the population growth nearby has been very good for their business growth and these new customers are a significant part of their retail sales growth.
- Many retailers have positioned themselves in the quality and higher end price point range and are achieving success.
- Overall, Kleinburg retains the mix of good sales growth from population growth of mid to higher end residents, regional draw in the summer months, and a location that still creates an overall atmosphere that blends an attractive setting with retail commerce opportunities.
- In terms of cross-shopping, many retailers recognize the importance of cross-shopping to the health and viability of their own stores. Retailers remarked that customers will come in to their stores with bags from other stores. A few retailers stated their success is purely the result of their own marketing, service and product assortment.



Future Changes

- Retailers and service providers indicated that they want to continue to evolve their positioning, price points, unique/exclusive product/food/service assortment, and/or size of their store to stay competitive and continue sales growth opportunities.
- The innovative retail environment is attracting entrepreneurial people to Kleinburg Village. This is a stark change from 2010.
- Few mentioned that they are looking to expand through online sales but online was of interest for a number of retailers they were not sure of the timing.



BIA Issues Suggested Initiatives

- Almost all interviewees acknowledged the BIA and their efforts to improve business conditions, communications, and marketing / events in the village. The best achievement to date for the BIA is the increased communication and participation of members and other stakeholders.
- Many interviewees remarked on the increased functionality and communication of the BIA with members and other stakeholders (e.g., KARA, McMichael, etc.) as extremely positive and that work should continue to expand the member participation.
- Moving forward, there were numerous ideas on how to continue the good work completed to date. Including:
 - Increased BIA membership participation and communication
 - Marketing and event ideas (See below)
 - Improved parking, more parking, increased shared parking, decreased concern of customers using other people's parking
 - Streetscape program – how to maintain and increase the beautification of the village, how to ensure the streetscape plan is affordable, ensure the village matches the residential look/feel
 - Executable business plan for the BIA to follow
- There were numerous ideas related to resource prioritization for the BIA especially related to marketing and events:
 - Events should be on Sunday as that is the day when the whole family is not at work
 - Less emphasis on print media and more on social media
 - Increased marketing outside of the local area and focus on similar demographic markets in the Greater Toronto Area

City Issues and Suggested Initiatives

- Generally, those that have had dealings with the City indicated that improvements have been made but there are still issues:
 - Silo'ed City departments and lack of internal communication need to be addressed
 - Lack of understanding of City requirements (e.g., signage rules, change of use engineering drawing requirements, etc.)
 - Lack of incentives to help redevelop properties and maintain or enhance Heritage Conservation District guidelines
 - Traffic – high volumes during late afternoon commute, pedestrian safety issues, and lack of parking or coordinated parking
 - Streetscaping – want increased beautification by City and better garbage bins, etc.
 - Need a unique balance for development that continues to allow for growth and change but enhance the village atmosphere at the same time

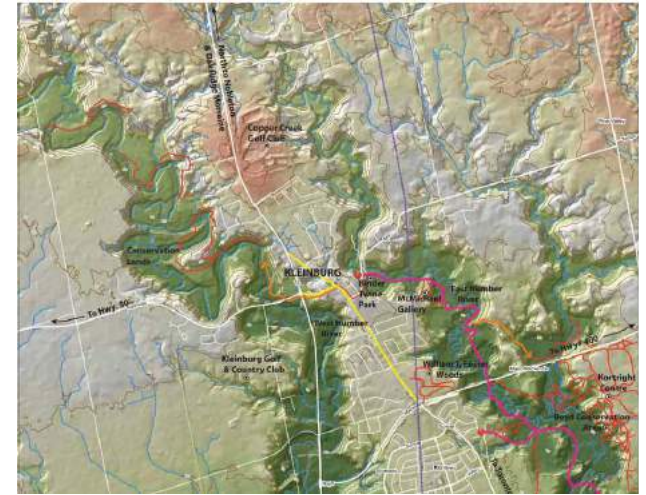
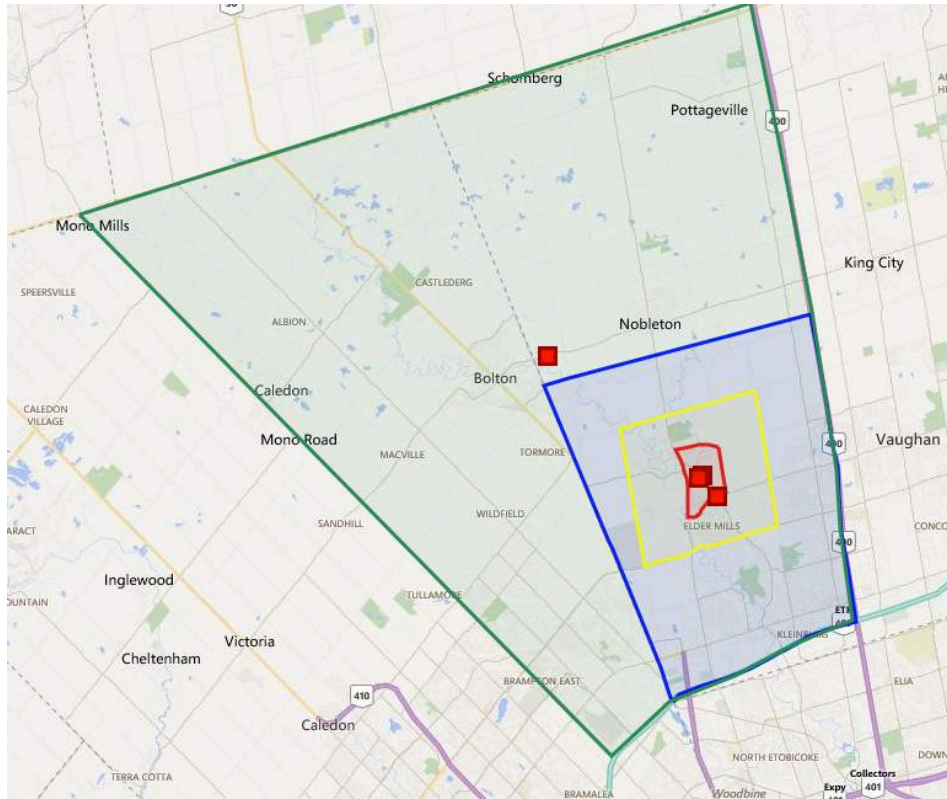
Other Stakeholders

- All stakeholders noted that there was increased or better relations between the BIA and/or retailers and their organizations
- This includes better communication and sharing resources
- Retailers have successfully partnered with other stakeholders for events, programming, and mutual benefits in a positive manner
- They are looking towards increased collaboration

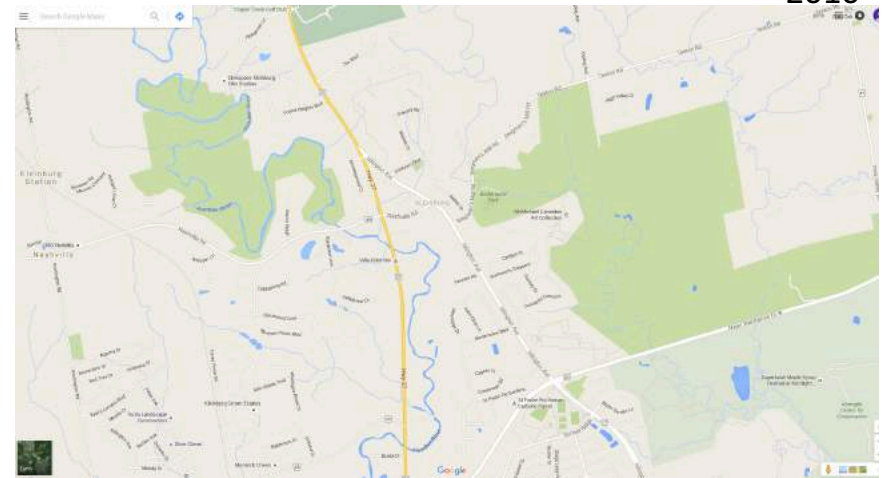
Kleinburg Village Trade Area Review

Compared similar trade areas in 2010 to 2015

Kleinburg Village Trade Areas



2010



2015

Trade Area Profile

From the previous study in 2010, the population within Kleinburg Village has increased significantly.

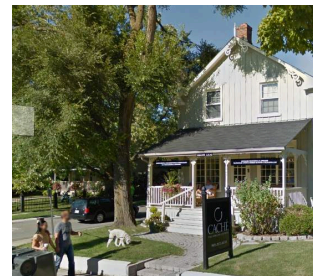
There are 3,686 residents within the village compared to 1,971 in 2010. The Western Vaughan population has increased from 95,276 to 130,077.

The completion of Averton and more residential projects proposed or almost completed will continue to add to retail demand.

Average household size is still relatively high reflecting large families with young children.

There has been significant growth nearby at Impressions and other developments such as Kleinburg Crown Estates.

	Kleinburg Village	Kleinburg/ Nashville	Western Vaughan	Tertiary Trade Area
Population Est 2015	3,686	21,536	130,077	269,379
Annualized Growth Rate	3.2%	1.1%	1.8%	2.9%
Household Est. 2015	1,016	6,199	39,969	78,038
Annualized Growth Rate	3.1%	1.3%	2.8%	3.4%
Persons Per Household	3.45	3.42	3.23	3.43



Source: Statistics Canada, Environics Estimates

Note: same trade area boundaries as the KEDS 2011 Study

Trade Area Profile – Age Profile

The age profile continues to skew towards large families. While typically the families have been older (40 to 59 years of age with teenaged children), there has been growth in younger families with younger children moving into the area.

In addition, Kleinburg Village continues to account for a high proportion of seniors.

Age Profile	Kleinburg Village	Kleinburg/ Nashville	Western Vaughan	Tertiary Trade Area
0 to 9	11.7%	14.2%	12.4%	12.9%
10 to 19	16.5%	16.4%	13.4%	13.9%
20 to 29	13.4%	11.8%	12.8%	13.3%
30 to 39	8.8%	11.3%	13.0%	13.6%
40 to 49	15.3%	18.4%	15.6%	15.5%
50 to 59	14.8%	13.2%	13.6%	13.4%
60 to 69	8.1%	7.3%	9.7%	9.2%
70+	11.5%	7.3%	9.4%	8.2%
Median Age	39.6	37.2	38.7	37.4

Source: Statistics Canada, Environics Estimates

Kleinburg Village Age Profile Change 2010 to 2015

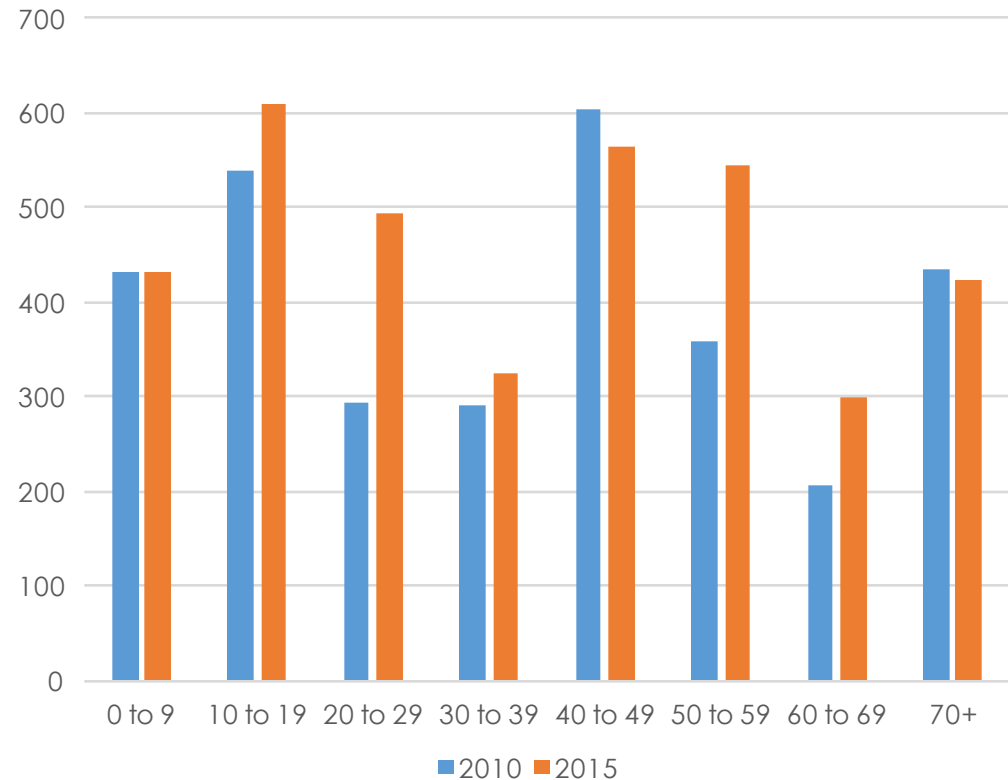
Growth has occurred most notably for 20 to 29 year olds and 50 to 59 year olds.

There has been growth in 10 to 19 year olds and 60 to 69 year olds.

The most critical concern is the lack of growth in the key demographic 40 to 49 year olds.

Those retailers reliant on this demographic will need to shift focus to witness sales growth.

360 Retail believes that the young children population is under-reported based on observational data and school enrollment data (see next page).



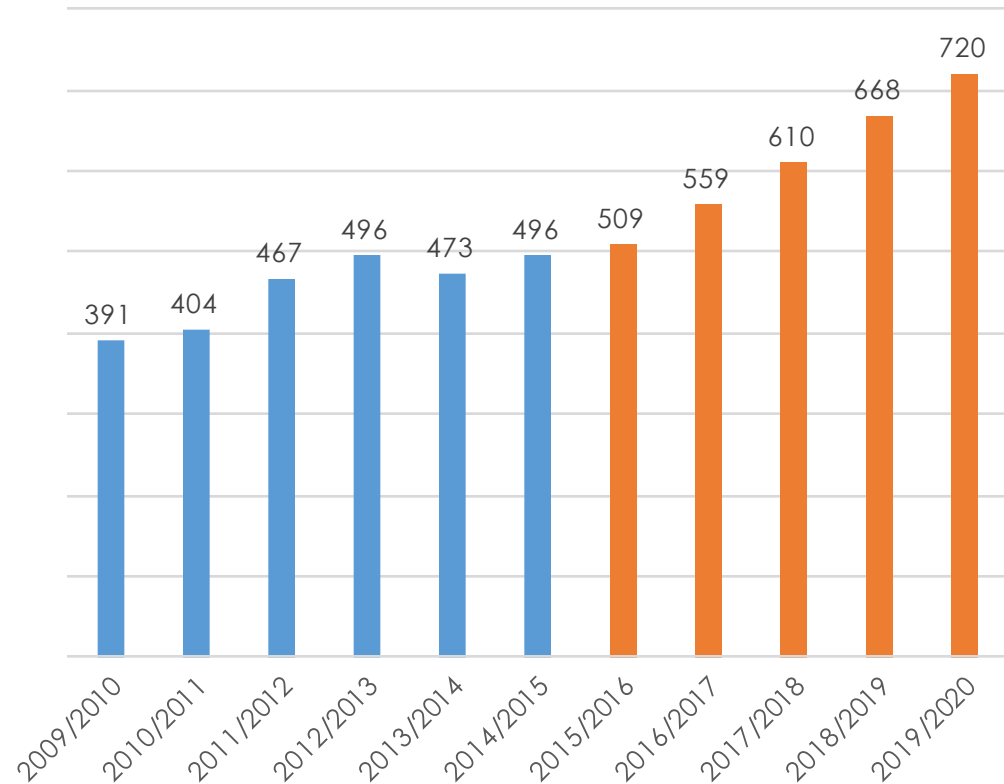
Source: Statistics Canada, Environics Estimates

Kleinburg Public School Past and Future Enrollment

As an indicator of population change, enrollment data at Kleinburg Public School illustrates the growth of elementary aged school children within the local area.

It is noted that some students in the area go to Nashville Public School.

The capacity of KPS is 574 – which will be attained by 2017. A new school will be required.



Source: Kleinburg Public School, York Region District School Board

Trade Area Profile – Other Factors

Household sizes are very large and reflective of families with teenaged as well as young adults living at home.

Observational data and the school enrollment data indicate that the number of young children is and will continue to grow.

Overall, Kleinburg attracts a well educated and white collar type professional.

Household Size	Kleinburg Village	Kleinburg/ Nashville	Western Vaughan	Tertiary Trade Area
1 Person	7.6%	7.4%	11.4%	10.0%
2 Persons	24.4%	20.8%	23.5%	21.6%
3 Persons	18.6%	18.5%	19.3%	18.0%
4 Persons	30.1%	34.0%	28.0%	27.5%
5+ Persons	19.3%	19.3%	17.8%	22.9%
Marital Status				
Single	22.5%	24.3%	26.4%	26.3%
Married/Common Law	67.4%	66.2%	63.1%	63.6%
Sep./Div./Widowed	10.1%	9.5%	10.5%	10.1%
Education				
Bachelor Degree +	26.3%	23.3%	22.4%	22.5%
Occupations				
Office Worker, Educ., Govt, Hlth.	56.2%	55.0%	53.7%	51.5%
Sales and Service	17.1%	20.9%	23.5%	22.5%
Trades, Trans., Utilities, Mfg	19.8%	20.3%	18.7%	21.6%
Arts, Culture, Recreation	2.8%	2.2%	2.0%	2.0%
Other	4.1%	1.6%	2.1%	2.4%

Source: Statistics Canada, Environics Estimates

Trade Area Profile – Household Income

Average household income is very high in comparison to other nearby areas.

As indicated, there are a number of young adults living at home which pulls down the income profile.

In addition, the high proportion of seniors on fixed incomes affects the income profile.

It is interesting to note that the new households that have moved into the area have high household incomes but not as high as the previous occupants. This caused a decrease in real household income growth.

Household Income	Kleinburg Village	Kleinburg /Nashville	Western Vaughan	Tertiary Trade Area
< \$20,000	12.4%	6.8%	6.1%	5.6%
\$20,000 to \$39,999	13.5%	11.7%	10.6%	9.9%
\$40,000 to \$59,999	12.5%	11.8%	12.3%	12.2%
\$60,000 to \$79,999	11.2%	12.1%	11.6%	12.3%
\$80,000 to \$99,999	7.7%	12.7%	11.9%	12.8%
\$100,000 to \$149,999	15.2%	3.4%	22.9%	23.5%
\$150,000 to \$199,999	10.0%	12.0%	11.9%	12.1%
\$200,000 +	15.8%	9.4%	12.5%	15.0%
Average Household Income	\$138,769	\$118,387	\$132,061	\$129,204
Real Growth in Household Income (2010/2015)	-1.4%	-0.5%	-0.5%	-0.5%

Source: Statistics Canada, Environics Estimates

Trade Area Profile – Transportation to Work

The car is the dominant form of transportation.

Businesses are very dependent on vehicular traffic for visitation.

Transportation to Work (15 Yr+)	Kleinburg Village	Kleinburg/ Nashville	Western Vaughan	Tertiary Trade Area
Car Driver	88.6%	86.7%	85.2%	85.6%
Car Passenger	5.0%	5.3%	5.7%	5.7%
Public Transit	4.9%	6.7%	7.5%	6.7%
Walk	1.1%	0.8%	1.0%	1.0%
Other	0.4%	0.5%	0.7%	1.0%

Source: Statistics Canada, Environics Estimates

Trade Area Profile

– Household Expenditures

Kleinburg Village households spend a higher proportion of their budget on:

- Food services
- Recreational memberships
- Food from stores
- Personal care services
- Sporting goods, books, leisure
- Men's clothing
- Women's clothing

Kleinburg / Nashville households spend a higher proportion of their budget on:

- Health care and pharmacy items
- Food services
- Personal care services
- Children's clothing and accessories
- Furniture and home furnishings
- Women's clothing and accessories
- Food from stores

The most significant change from 2010 is the increased amount of eating out at food services as well as men's clothing and accessories.

Household Expenditure	Kleinburg Village	Kleinburg/ Nashville	Western Vaughan	Tertiary Trade Area
Women's Clothing and Accessories	\$2,820	\$2,578	\$2,683	\$2,596
Men's Clothing and Accessories	\$1,935	\$1,589	\$1,747	\$1,729
Children's Clothing and Accessories	\$116	\$140	\$125	\$136
Furniture and Home Furnishings	\$3,132	\$3,084	\$3,036	\$3,037
Sporting Goods, Book, Leisure	\$1,113	\$936	\$995	\$991
Food from Stores	\$8,275	\$6,998	\$7,284	\$7,144
Health and Pharmacy Related Goods	\$1,668	\$1,885	\$1,793	\$1,717
Personal Care Services	\$1,031	\$939	\$928	\$899
Recreation Memberships	\$591	\$408	\$523	\$509
Food Services	\$3,925	\$3,134	\$3,091	\$2,986

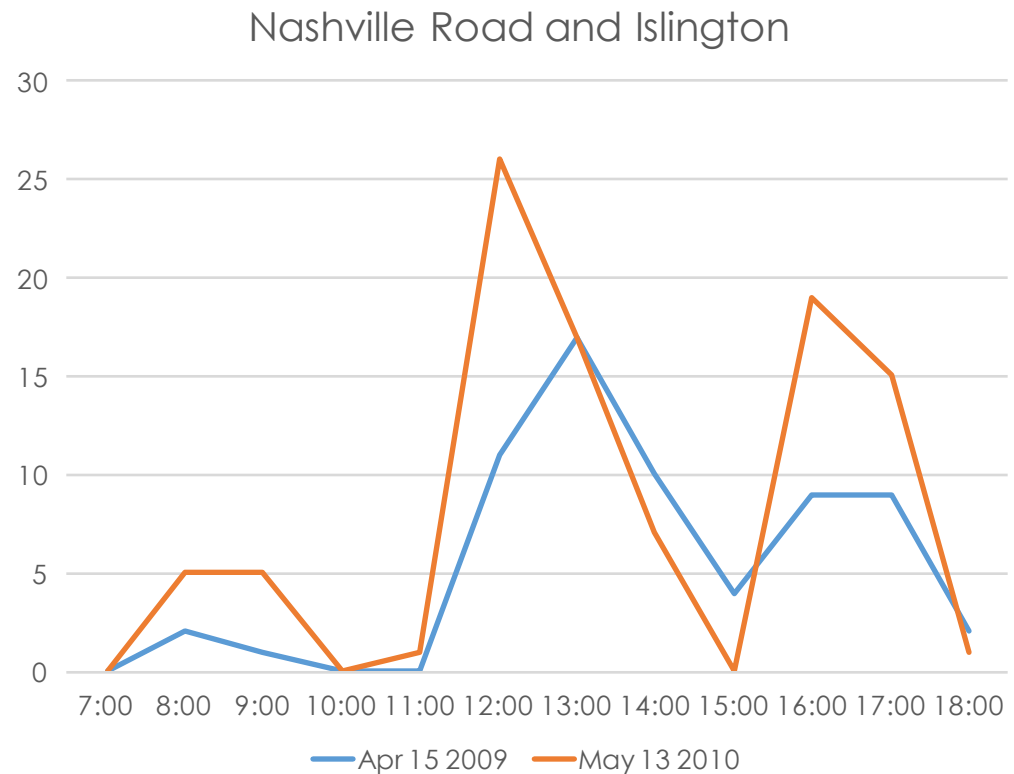
Source: Statistics Canada, Environics Estimates

Kleinburg Pedestrian Counts

No recent pedestrian counts since the 2010 study.

A comparison of 2009 to 2010 illustrates a growth in pedestrian volumes.

There is a lunch time spike and an after school spike in traffic.



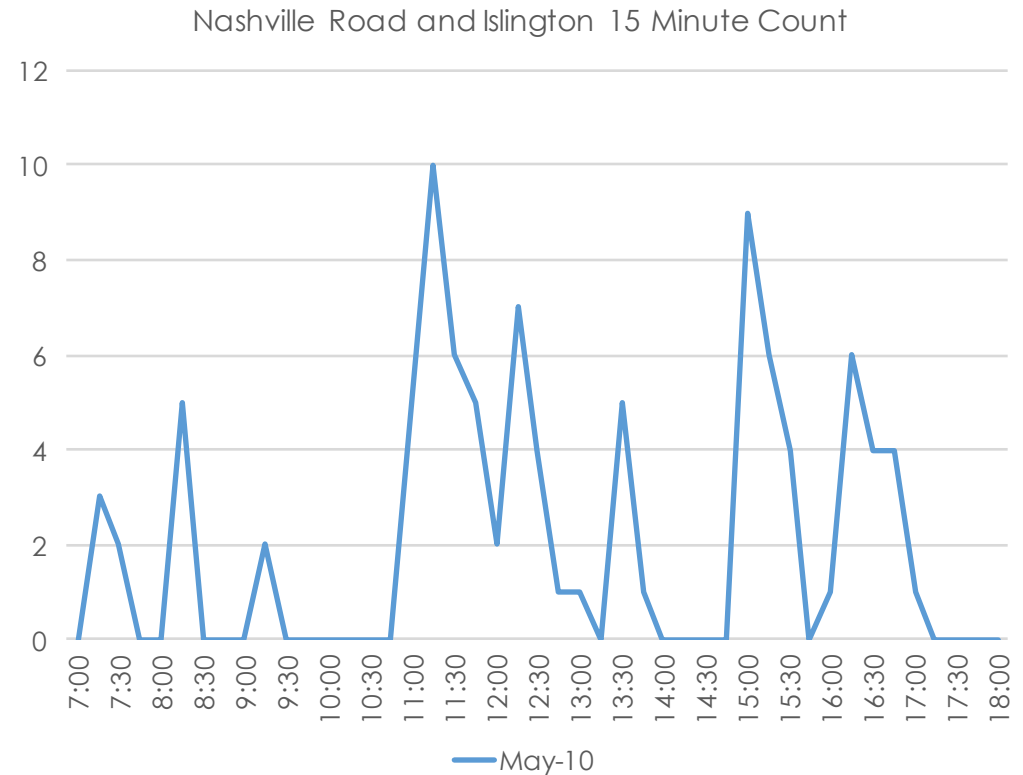
Source: City of Vaughan Transportation

Kleinburg Pedestrian Count

There are five spikes throughout the day:

- Morning commute
- Lunch
- Early afternoon shopping
- End of school day
- End of day commute

Retailers should be able to take advantage of these pedestrian spikes in traffic.



Source: City of Vaughan Transportation

Website Update

Significant change in website and logo from 2010 to 2015.

Logo – reflects the natural landscape as a differentiator.

Recent hire of new marketing firm.

Able to shift brand essence to blend retail and shopping components with strengths of the area (landscape, McMichael, etc.)

Increased user reviews and intuitive groupings.

2010

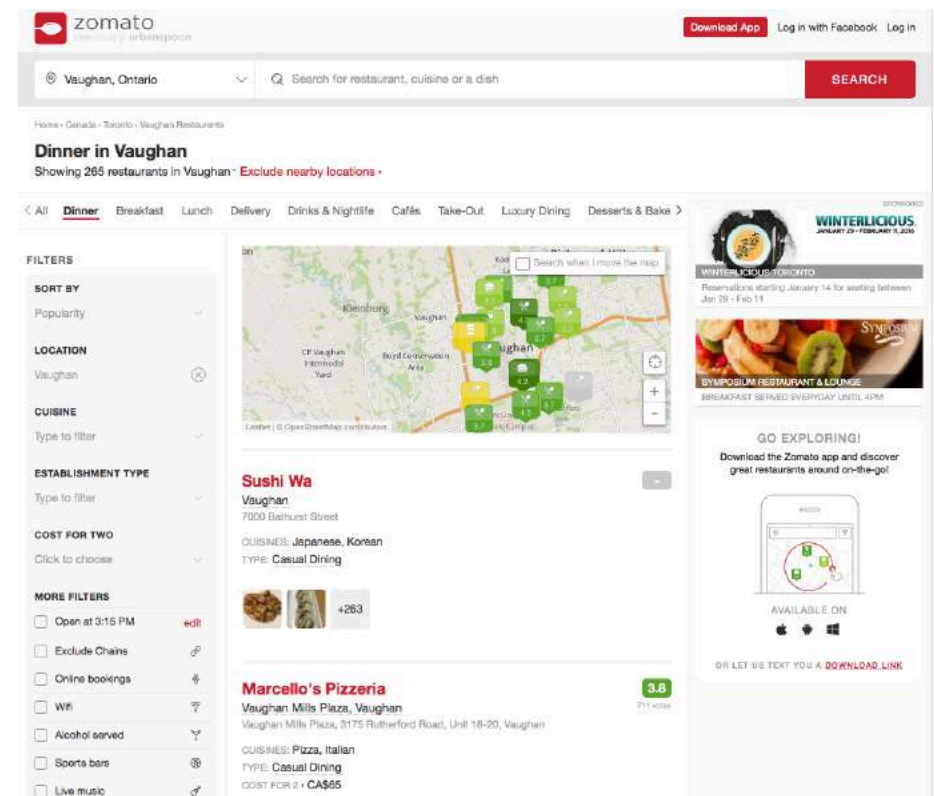


2015

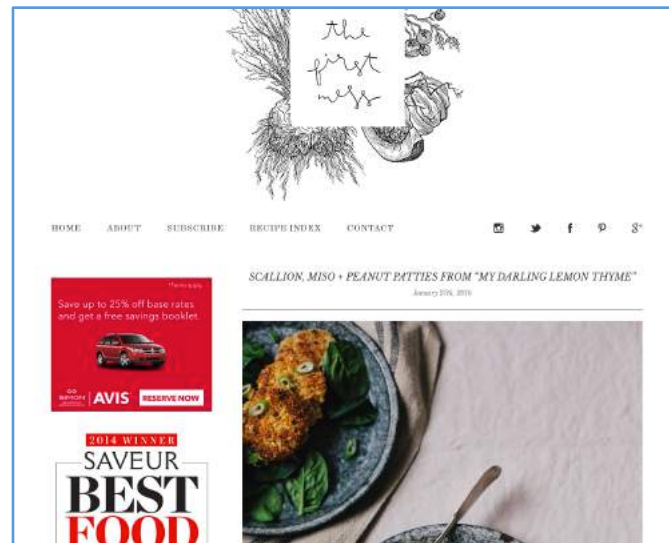


Social Media Review

- Despite the high quality restaurants there are limited mentions for Vaughan.
 - Yelp.ca: 0 restaurants listed in Top 10 for Vaughan
 - Zomato: 0 restaurants listed as dinner in Vaughan
- Search for Kleinburg restaurants in Yelp and Zomato and they are listed
- Increased attention needs to be spent on PR, peer reviews, food bloggers, etc.



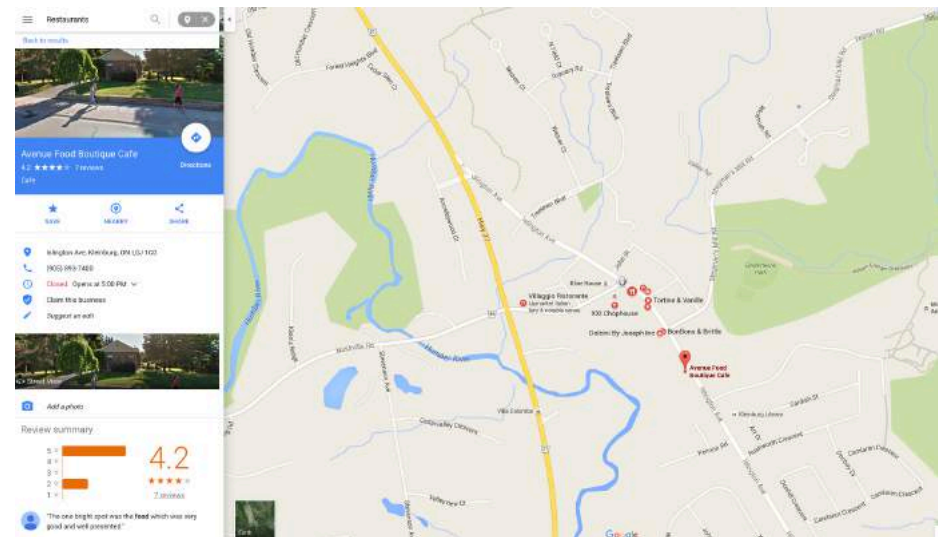
Food Bloggers



Google Reviews



Starbucks should have more images of the Kleinburg location rather than generic stock images.



Avenue Restaurant is located in the wrong location. Negative reviews should be quickly addressed.

Kleinburg Village
Retail Audit
2010 and 2015

Kleinburg BIA Retail Audit 2010 and 2015

Total retail has increased by 2,500 m².

The proportion of retail merchandise has remained the same but there have been significant shifts as there are fewer home furnishings stores and more clothing and accessories stores.

The quality of the retail offering has increased.

There is little change in terms of convenience type retail.

Food services witnessed the most change as more restaurants opened and other restaurants redeveloped.

In terms of services, the growth has occurred in more medical services.

The vacancy rate has declined.

For the audit, signed leases were taken as tenants rather than as vacant units.

	Number of Stores	% of Total	Square Meters	% of Total		Number of Stores	% of Total	Square Meters	% of Total
Retail Merchandise									
Automotive	0	0.0%	0	0.0%		0	0.0%	0	0.0%
Furniture and Home Furnishings	4	6.3%	535	5.0%		2	2.9%	440	3.3%
Electronics and Appliances	0	0.0%	0	0.0%		0	0.0%	0	0.0%
Building Materials, Garden and Supplies	0	0.0%	0	0.0%		0	0.0%	0	0.0%
Clothing and Accessories Stores	4	6.3%	290	2.7%		7	10.3%	584	4.4%
Sporting Goods, Hobby, Book and Music Stores	2	3.2%	160	1.5%		1	1.5%	40	0.3%
General Merchandise	0	0.0%	0	0.0%		0	0.0%	0	0.0%
Other Retail - Florists, Antiques, Tobacco, Pet, Gallery	5	7.9%	527	4.9%		4	5.9%	687	5.1%
Total Retail Merchandise	15	23.8%	1,512	14.0%		14	20.6%	1,753	13.1%
Convenience Goods									
Food and Beverage	2	3.2%	100	0.9%		1	1.5%	40	0.3%
Health and Pharmacy	1	1.6%	100	0.9%		1	1.5%	100	0.7%
Total Convenience Goods	3	4.8%	200	1.9%		2	2.9%	140	1.0%
Services									
Food Services		0.0%		0.0%			0.0%		0.0%
Limited Food Service	5	7.9%	530	4.9%		4	5.9%	440	3.3%
Full Food Service	4	6.3%	1,971	18.3%		7	10.3%	3,041	22.7%
Total Food Services	9	14.3%	2,501	23.2%		11	16.2%	3,481	26.0%
Personal Services									
Personal Care Services	10	15.9%	1,020	9.5%		11	16.2%	1,070	8.0%
Commercial Banking	1	1.6%	250	2.3%		1	1.5%	250	1.9%
Other Personal Service	2	3.2%	180	1.7%		2	2.9%	180	1.3%
Total Professional Service	13	20.6%	1,450	13.4%		14	20.6%	1,500	11.2%
Professional Services									
Medical	3	4.8%	196	1.8%		7	10.3%	870	6.5%
Professional Offices including Veterinary and Photography	12	19.0%	3,098	28.7%		12	17.6%	3,077	23.0%
Schools - Dance	1	1.6%	600	5.6%		2	2.9%	820	6.1%
Child Day Care Services, Social Services	1	1.6%	180	1.7%		2	2.9%	520	3.9%
Total Professional Service	17	27.0%	4,074	37.8%		23	33.8%	5,287	39.5%
Total Occupied Retail	57	90.3%	9,737	90.3%		64	94.1%	12,161	90.8%
Vacant Retail	5	7.9%	924	8.6%		2	2.9%	630	4.7%
Total Retail Commercial	63		10,781			68		13,391	

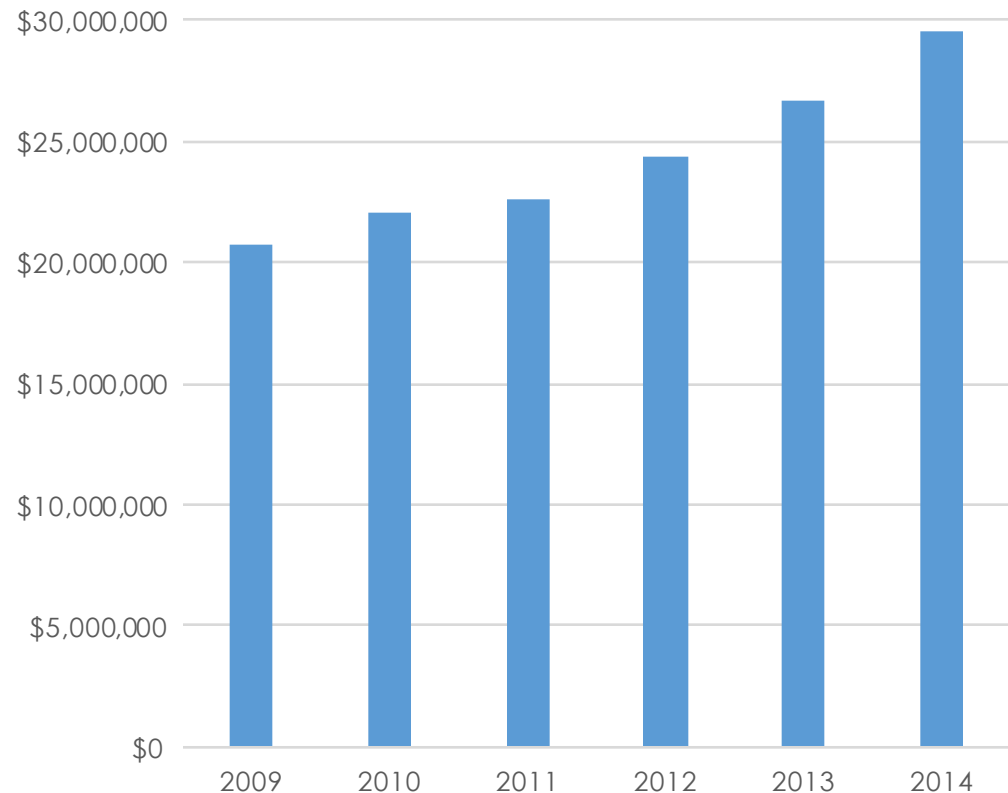
Assessed Value

Assessed value of commercial properties in Kleinburg have increased at an annualized rate of 7.3% from 2009 to 2014.

This is the result of natural growth and the inclusion of three additional properties.

Excluding the additional properties, the natural growth was 5.8% annualized from 2009 to 2014

In 2016 the completion of Heritage Hills will contribute significantly to increased value.



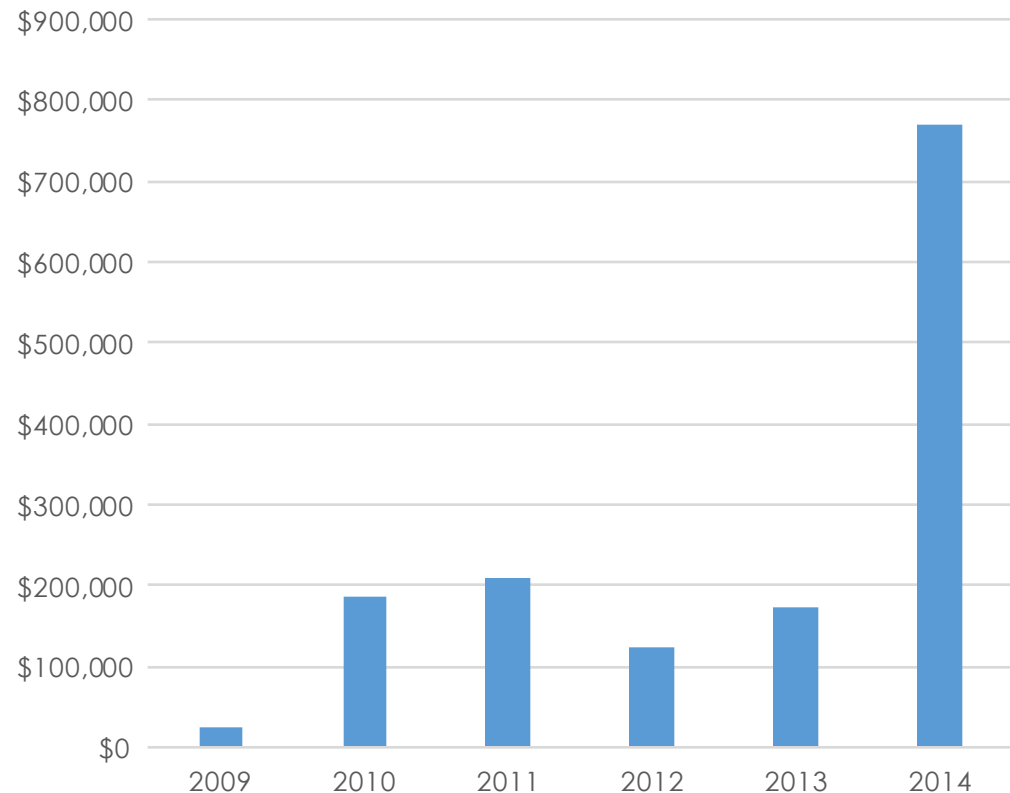
Commercial Building Permit Values

From 2010 onwards there has been significant investment in the retail commercial businesses in Kleinburg.

In 2014, the commercial component of the Heritage Hills development combined with several other projects pushed the building permit value toward \$800,000.

*based on application date

** for retail commercial buildings only



Investment by Property Owners

- Property owners continued to invest in their properties to keep them fresh looking or adding more parking for customers, etc.



Action Items

Status Update 2016

Short Term

Position KBIA as a Catalyst for Change

Be Investment Ready

Establish Kleinburg as the Meeting Place that People Want to Visit

Long Term

Placemaking to Create the “Kleinburg Experience” based on a rich, natural and built heritage

Eliminate Barriers to Development

Position KBIA as a Catalyst for Change

Action Step (June 2011)	February 2016 Status Update
Increase BIA budget and allow for a natural increase in the budget through assessment changes	Modest increase from \$26,000 to \$40,000 (below requested budget in report) No increase in budget associated with assessment changes
City and BIA source alternative funding	Yes – funding for events, Central Counties Tourism funding for February Festival and obtained sponsorship funds
Board increased and committees struck	Complete; may need a mobility or parking related committee
Hire Executive Director	At present, budget does not permit hiring staff
Marketing committee coordinate with broader community on hospitality issues	Yes – BIA sits on KARA and works with McMichael
BIA increase communication with non-members	Yes, but is a continual work in progress
Coordinate with local groups	Yes – KARA, Trees for Kleinburg, Leos, McMichael, etc.
Search out opportunities for marketing or maintenance staff	Hired marketing firm Have switched marketing firms to Pixelbrand
Develop MOU between City and BIA on beautification and maintenance	Not completed

Be Investment Ready

Action Step (June 2011)	February 2016 Status Update
BIA set goals for retail mix • 30% retail merchandise • 20% food services • < 5% vacancy • 10 min. specialty boutiques • 10 business open past 6 pm	13% 26% 5% 10 11
City provide small retail business recruitment and retention	Yes – instrumental in facilitating change over past five years
BIA database of properties	Good but still work in progress
Kleinburg Farmers' Market	Attempted but did not last; should refocus efforts
Retail retention programs	Have begun, difficult to encourage change at retailer level
Develop one page "sell" sheet	Not completed
Develop interactive maps	Work in progress
Develop mix of uses in Village, retail block planning strategy	Work in progress

Establish Kleinburg as Meeting Place to Visit

Action Step (June 2011)	February 2016 Status Update
Coordinate joint marketing programs	Work in progress (see previous comments)
KBIA set out marketing budget and priorities	Yes
Work with PR firm for 30 minutes and 2 hour drive time	Work in progress
Ensure businesses use Kleinburg in their contact info	Work in progress – some do and some do not
Redevelop website	Done, work in progress
Develop social media	Done, started in 2013 and continues to be work in progress (twitter inc)
Collect stories and peer reviews	Done, work in progress
Enhance PR with media	Done, work in progress
Develop tourist information kiosk	No
Develop consistent shopping hours	No
Explore cross marketing	Done, work in progress
Increase number of events	Done, work in progress to continue to evaluate them
Develop partnerships with tourism sectors	Done, work in progress
Search out other niche marketing	Done, work in progress

Placemaking Physical Design

Action Step (June 2011)	February 2016 Status Update
Streetscape Master Plan should take Kleinburg Econ. Dev. Strategy into account	Streetscape plan was stalled and is being revived as part of a process between the City and stakeholders
Review public and private signage	TBD
Develop a coordinated natural heritage and trail program	Some work completed, work in progress
Develop a village square	Not complete
Develop distinctive gateways and wayfinding	Not complete

Placemaking Accessibility and Circulation

Action Step (June 2011)	February 2016 Status Update
City's transportation planning and engineering to review boulevard parking	IBI completed parking strategy in 2010 but it has not been including in Zoning. Reason is that sections of the Official Plan have not been approved so the City is waiting for OP work to be completed before changing the Zoning
Assessment and implementation of any transportation and mobility issues should be coordinated with Streetscape Master Plan actions	Streetscape plan was completed but not put into action See note above on IBI and Zoning
Assess need for bike parking	Not officially part of Zoning so lack of enforcement, but City encourages where appropriate
Explore opportunities for properties to link private parking lots	City recognized this recommendation is valid in principle; but is difficult to put into action due to legal issues and getting the agreement right between the two potential affected parties
Develop policy for business staff to allow/encourage parking in remote locations	Not complete as part of BIA
City to encourage greater pedestrian flow across both private and public land	Not necessarily encouraged at City level
Develop a snow clearing and removal program	Yes

Eliminate Barriers to Development: Planning

Action Step (June 2011)	February 2016 Status Update
Review opportunities for incentives to help new businesses grow including CIP	No CIP plan in place, still in discussion
Consider revising maximum FSI to be consistent with OP	City is consistently reviewing urban design issues but no revision of FSI. City reviewing guidelines on policies for infill projects. This process will address some Kleinburg issues
Consider removing restrictions on entertainment on patios and outdoor merchandising	Relaxed enforcement of bylaw to allow this to happen
Develop noise mitigation strategy	City continually looks at different ways to address these issues. Try to use built form for noise mitigation
Review allowable retail use clauses during Zoning By-law review	No specific changes
During Zoning By-law review determine need for minimum retail frontages and/or restrictions on professional services	See infill guidelines study currently underway
Apply HCD guidelines consistently but with flexibility	Difficult at City level to enforce and apply Heritage is now under purview of Urban Design which is a positive direction
Develop a detailed massing and urban design study	See infill guidelines study currently underway
Establish HCB area specific standards for other services such as garbage and parking	Site specific on a case by case basis

Eliminate Barriers to Development: Parking

Action Step (June 2011)	February 2016 Status Update
Adopt the March 2010 parking supply rate requirements for development applications	See IBI note and Zoning
Adopt and apply the shared parking calculation methodology	See previous notes on IBI, zoning and difficulty of shared parking
City's transportation planning and engineering establish a benchmark for publicly available parking supply	Not completed
Assess opportunities for shared parking with public school and library	Not completed
Extend boulevard parking north of Nashville	No new boulevard parking has been added to date but City would allow for more on-street parking in front of proposed developments where none existed previously
Use United Church parking lot for public parking	Funds and plans are in place for parking and community space
Review tour bus pick up/drop off at public school	Not completed
Amend By-law 159-2006 Cash in Lieu of Parking Policy to reflect current fees and best practices	See IBI note, no changes have been made to the Cash in Lieu system
Complete exercise of priority transportation related projects that can be used with Cash in Lieu funds	Not completed